IntelliRegs User's Manual

IntelliRegs Product Information, Installation, and Usage

State Forms Preference=Texas Users Version

Process Data Control Corporation

IntelliRegs User’s Manual

Section#

IntelliRegs User's Manual Section 1:

Introduction & General Instructions

The **IntelliRegs** program was created and is maintained by Process Data Control Corporation (PDC). The program's first versions, two separate programs, **Regulatory Wizard** and **IntelliTask,** were released in 1999. In Fall 2000 these two programs were merged into the IntelliRegs system.

The IntelliRegs program and databases are updated by PDC on an "as required" basis to reflect regulatory changes and/or suggested program improvements.

This IntelliRegs User's Manual provides information and operating instructions on all areas of the IntelliRegs program. This Section 1 introduces the IntelliRegs program and includes general operating instructions, installation and startup instructions, and general data entry/editing notes.

This Manual Is Provided As An Adobe .Pdf File

This User's Manual is provided as an Adobe Pdf file on the IntelliRegs installation CD. The latest version of the .pdf IntelliRegs User's Manual is available for download from PDC's website, pdccorp.com.

The .pdf includes bookmarks to enable quick navigation to the desired subject area and can be used during operation of the IntelliRegs program as "online help" documentation, and/or to print User's Manual pages. Also included are hyperlinks to referenced screen prints and sections of the manual.

Not all report examples (one-page example printouts) or attachments of Sections 3 and 5 and 6 are captured into the User's Manual pdf file. Users are encouraged to print example reports for those sections from the provided Demo data or print example reports from their own facility data and add those printouts to the example and attachment sections if a printed manual is desired.

Microsoft PowerPoint slideshow .ppt files and other documentation and instruction files are also provided on the installation CD and available for download from the PDC Website.

Printed Copies Of The User's Manual Are Available From PDC

Printed copies of this User's Manual, or just the attachments and example reports, may be ordered from PDC. Printed copies are useful as reference (and markup of user comments and amplifications) and useful during training. It is recommended that at least one printed copy of the manual be available while using the program.

IntelliRegs User's Manual

Section 1

IntelliRegs Introduction & General Instructions

Paragraph and Title **Page**

J. Using IntelliRegs Data In PDC's System

- ***IntelliRegs Data Can Be The Foundation/Base For TaskTrakker Compliance Management Ops***
- ***Revisions to IntelliRegs Data and Updating TaskTrakker With Those Changes***

A. Introduction to IntelliRegs

IntelliRegs is a powerful, yet easy-to-use software program that provides for efficient creation, maintenance, and reporting of Compliance & Applicability data and Compliance Task definitions.

The IntelliRegs program and data files have been developed, and are maintained and enhanced by, Process Data Control Corporation (PDC). The program command file and data storage databases are Microsoft Access files.

About This Manual

This User's Manual introduces the IntelliRegs program, provides user operating instructions, and includes examples of program reports. The manual is broken into sections reflecting the operation groupings and selection sequences of the program.

The User's Manual is intended to provide information necessary for a user to understand and successfully use program features. The User's Manual does not include instructions or explanations of regulatory citations themselves, or cover environmental law issues. It is important that users refer to actual **TCEQ** instructions and other official source documents as appropriate to complement the use of IntelliRegs.

Why Use The IntelliRegs Program?

Use of IntelliRegs is important to:

1.) Preparation, submittal, and data storage of Title V applications.
2.) Data entry and reporting of NSR and other citation applicability.
3.) Development of compliance task definitions for applicable citations.
4.) Data exchange with PDC's Compliance Management System. Exports from IntelliRegs to PDC's TaskTrakker software become the foundation of your facility's Compliance Management Plan.
5.) Revisions based upon process, rule, or Form/RRT changes.
    a.) Identifying and documenting Title V Permit changes.
    b.) Preparation and submittal of Title V Amendments and Revisions.
    c.) Identify and implement compliance task revisions resulting from changes.

IntelliRegs provides efficient and effective processing and procedures for data entry, review, reporting, and management of change. All functions are performed from a single, integrated, database-based program.

Getting More Information And Technical Support

For information or technical support for IntelliRegs contact PDC:

Process Data Control Corporation (817) 459-4488
1803-A W. Park Row
Arlington, TX 76013

B. General Features Review and Program Files

IntelliRegs Features Overview

Functions of IntelliRegs are performed within main program operational sections:

1.) Program Startup and Databases Connection
2.) Permit & Applicability Operations
3.) Unified Operations
4.) Task Definition Operations
5.) Task Definition Operations

Within each of these operational sections, functions are available to perform the required data entry, utility, processing, and reports.

1.) Program Startup and Databases Connection
    - Confirm proper program version, runtime, and security configurations.
    - Confirm external database connections (or require connect before proceeding)
    - Provide for connection to external databases.
    - If startup OK, offer Startup Window to begin program operations.

2.) Permit & Applicability Operations
    - Identify your facility and equipment and classify all equipment regarding Title V reporting requirements and equipment type.
    - For each Title V reportable equipment item: enter OP-UA form data and/or enter directly applicable negative applicability citations. IntelliRegs will automatically process RRT-determined applicable citations per OP-UA entered attribute values.
    - Analyze RRT-determined applicability and revise/modify for your facility equipment-specific specifications.
    - Create Title V submittal data, final edit if required, and submittal in electronic files.
    - Export applicable data to TaskTrakker for Compliance Management Plan.
    - Following initial permit submittal, revise data as required for Process, Rule, or TCEQ document changes, analyze/document the changes, and submit Title V amendment and revision documents as appropriate.

3.) Unified Operations
    - Enable revisions that reflect the latest version Permits/Applicability and Regulations/Task Definitions data.

4.) Task Definition Operations

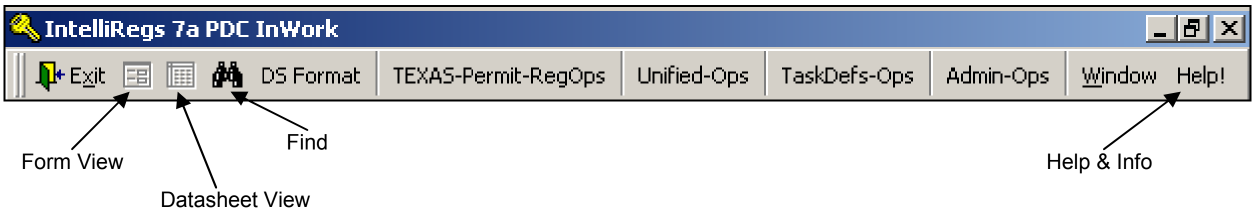
- ✦ For applicable citations import, or enter, citation paragraph text.
- ✦ Set keywords and break citations into components for task processing.
- ✦ For each citation component/task, enter task attribute values to form a base compliance task definition template.
- ✦ Export task definition templates to TaskTrakker for broadcasting to equipment as detailed equipment-specific compliance task definitions.

5.) Task Definition Operations

- ✦ Determine Task Definition development status.

IntelliRegs Program Menu Bar And Help Selection

The IntelliRegs menu bar is available during all operations and provides for selection of all main data entry and dialog windows. All operations are reviewed in detail within this User's Manual. An example of the IntelliRegs menu bar is shown below with annotated labels for key selections:

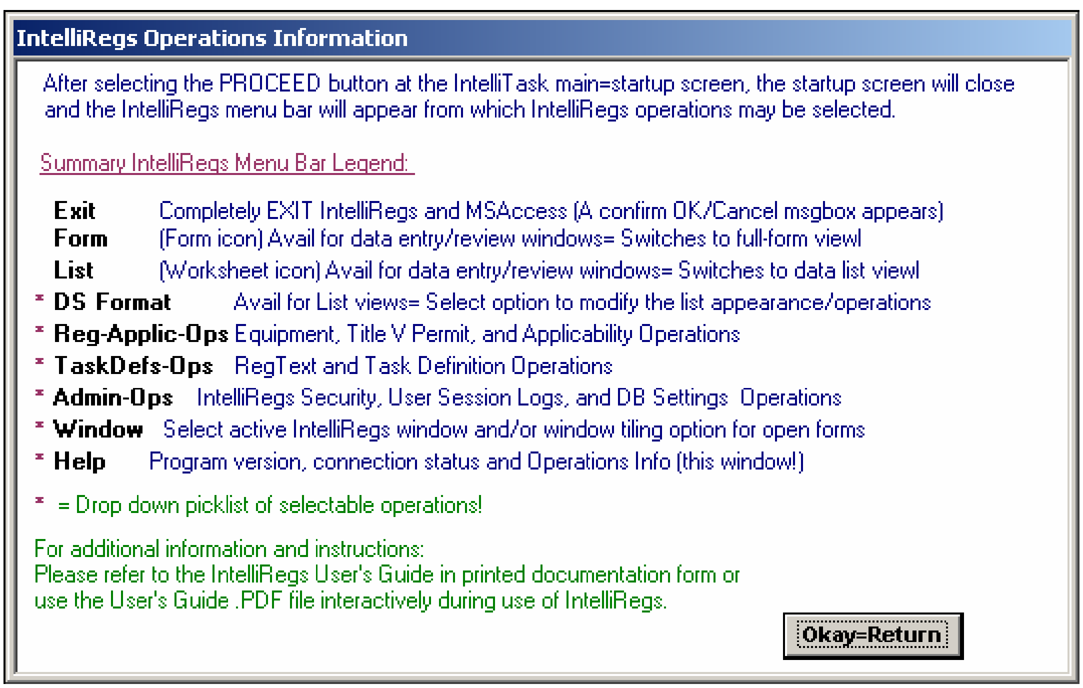


Help and Info Selections

Selection of *HELP* from the IntelliRegs menu bar offers two items on the dropdown list providing help and information, *IntelliRegs Ops Info* and *About IntelliRegs*.

IntelliRegs Ops Info

The ***IntelliRegs Operations Information*** screen, as shown below, provides online general instructions on the IntelliRegs menu bar and program use.



About IntelliRegs

The ***IntelliRegs - Version & Connections Information*** screen, as shown below, identifies the IntelliRegs version number, Knowledge Base version date, and the connected IR_* datafile. During any support call, PDC will likely request this screen be opened and reviewed.

Files Installed By And Used By The IntelliRegs Program

IntelliRegs installs and uses the following files:

> **Note**: On installation, all files are installed into the c:\IntelliRegs directory. IntelliRegs.mde and Rw_sys.mdw should stay in this directory on each workstation. The datafiles, WizBase.mdb, and IR*.mdb can be located on a server directory for multi-user access.

IntelliRegs.mde

The “command” file for IntelliRegs. This is an MS Access executable file. This file is replaced for IntelliRegs version changes. The name of this file may include the version number or contain the configuration version (such as IntelliRegs_A2WNT.mde). This is a compressed executable file format with no objects available to, or needed by, users directly. When the IntelliRegs application is upgraded to a new version, this file is replaced. Several MSOffice+Windows version configurations are provided.. _A97W98, A97WNT, A2WNT, A2WNT2. Once you find the correct configuration for your PC then use the upgrade for that

version for your PC. Licensed users will be notified on the availability and features of each upgrade and provided instructions for download or file use from the CD.

WizBase.mdb

This database file is referred to as the IntelliRegs "Knowledge Base" file. It is always connected to the IntelliRegs program during use. It contains all old and current TCEQ OP-UA forms information (including column layout, valid values, and printpage specifications), RRT Flow data, and a ancestry map of old to new forms and RRTs. PDC will issue updates of the WizBase.mdb Knowledge Base as required. The updated WizBase.mdb will be available for download from PDC's website. It is often provided for download within a zip file to reduce the file transmission size. Upgrade files may be provided on CD to licensed users or may be downloaded from PDC's website. Licensed users will be notified on the availability and features of each upgrade and provided instructions for download or file use from the CD.

WizBase.mdb is an encrypted, read-only file not available for use directly by users. **Users** should **not** attempt to **access** or **modify** this file directly in any way.

IR_*.mdb

Facility Applicability database file. The IR_*.mdb file must be custom named for facility-specific use, always beginning in name with IR_. IntelliRegs installs two IR_ files, IR_Demo1.mdb and IR_Empty.mdb. IR_Demo1.mdb contains some demo data, IR_Empty.mdb should be copied and renamed into the facility-specific datafile such as IR_PDC.mdb, or IR_Bayer.mdb. Note that Permit & Applicability datafile is now facility-specific named rather than generically named to a single filename as in Regulatory Wizard.

Other Files Installed:

Other files installed by the IntelliRegs installation are for enabling proper operations of the program within your Windows environment. Whether these files are installed or not, and to what directory, depends on whether the files already exist on the workstation (and the version of those files) and whether MS Access is operational on the workstation. One file installed and registered during the installation is an active X .OCX file that registers itself.

Your Facility Files Are Maintained, Never Replaced By IntelliRegs Updates

The IR_*.mdb database files contain your facility's data. The data in these files is not disrupted during updates of the IntelliRegs program. If structure changes in the data tables are required in version upgrades, the database updates (structural changes to tables) will be made automatically during the first startup of the updated IntelliRegs.mde.

C. System Requirements, Installation, and Upgrades

System Requirements

In general, minimum= required specifications for effective use of IntelliRegs are:

IBM Compatible Personal Computer
Windows 95 or later
Pentium 66 or better processor
RAM Memory= 16 MB minimum
Disk Space:

Minimum for Install and Review	30 MB
Recommended for Extensive Data Entry/Storage	50-100 MB

MSAccess 97 with SR1 and SR2
MSAccess 2000, 2003, … with SR1.

Installation Instructions

Installation of IntelliRegs is made from the Compass CD provided by PDC to licensed users of IntelliRegs. You must have MSAccess installed and operational and all Service Releases installed. For Access 97, the URL for SR support is:

http://support.microsoft.com/default.aspx?scid=kb;en-us;165272

IntelliRegs must be installed at/from each workstation which will run the program! Please do not try to install onto one workstation and copy files to another workstation.

Installation from the CD at each workstation insures the proper checking and updating of windows dlls, the proper registration of needed controls, and correct installation of the folder and shortcut for IntelliRegs.

PDC recommends that IntelliRegs.mde and RW_Sys.mdw be installed and run from each workstation for best program operations. Where possible, it is recommended that these files be installed and run from the default installation directory c:\IntelliRegs. On a version update of IntelliRegs.mde, this requires the new file to be copied/replaced to each Workstation but the performance benefits of individual copies on workstations is worth it. Other operational and recovery benefits also favor location on each workstation. For optimal viewing of all screens within the program, PDC recommends computer resolution be set to 1024 X 768.

> **Note**: Installation of IntelliRegs checks to see if Microsoft Access is already on the workstation. If found, then the existing MSAccess.exe is recognized and will be used to run the runtime environment for IntelliRegs. If MS Access is not already installed on the workstation, then a runtime version (fully licensed for runtime use with PDC's program) will be installed. Note that no changes will be made to the existing MS Access files that will affect any current/prior setups or program features.

Installation Instructions for First Installed Workstation:

1.) Be sure workstation meets System Requirements for IntelliRegs.
2.) Load PDC's Compass CD… from the automenu select… Install IntelliRegs.

3.) Follow installation instructions….
   a.) Do install into c:\IntelliRegs directory. (You can move later if required!)
   b.) Select "Typical" installation.
   c.) Allow installation to proceed. (A message box confirms success!)
4.) Restart workstation to insure registrations have been made.
5.) Startup "demo" program using Windows… Start… Programs… Compass… IntelliRegs selection. (If it does not startup properly, see Configuring IntelliRegs Startup Shortcut of this User's Manual.)
6.) Checkout IntelliRegs using the default connected demo databases. (See **Startup Section** of this User's Manual!) If okay, proceed to step 7, if problems, review manual corrective actions.
7.) a. <u>Existing users</u>: copy/rename IntelliRegs.mdb database files for new IntelliRegs naming: to IR_*.mdb (per User's Manual **Naming and Configuring For Your Facility**.)
   b. <u>New users</u>: Copy/rename IR_Empty.mdb for your facility data. (See User's Manual **Naming and Configuring For Your Facility**.)
8.) If you wish to run standalone operations at the workstation, leave facility database IR_*.mdb in the c:\IntelliRegs directory.
9.) If network=multiuser operations are required, create the server multi-user directory then move WizBase.mdb and your facility IR_*.mdb into the network server directory.
10.) Startup IntelliRegs using the Compass **IntelliRegs** startup icon.
11.) Select CONNECT and connect to your facility IR_*.mdb database. (See User's Manual **Connection to External Databases** for CONNECT instructions.)
12.) Proceed to use IntelliRegs for your facility's databases.
13.) External to Program use: it is recommended that only one copy of WizBase.mdb and your facility IR_*.mdb be accessible from a workstation to prevent accidental connection to an incorrect copy of these databases! Therefore, rename or delete any "other" copies of those files leaving the "production version" database files ready for operations.

Installation Instructions for Additional Workstations of Multi-user Operations:

* For each workstation to run/use IntelliRegs, follow instructions 1 through 6 of the Installation Instructions, then do steps 9, 10, and 11.

<u>Special or Custom Installation Instructions:</u>

Some installations may require special or custom installation instructions.

IntelliRegs Startup Shortcut Will Not Properly Run IntelliRegs:

There are several reasons the shortcut may not run properly as first installed. Check each reason and make corrections as required then run the corrected startup.

1) Incorrect path+filename IntelliRegs in the Target script.
2) User's MSAcces is not running properly (so IntelliRegs won't either).

Naming Your Facility Databases

The facility database—IR_*.mdb for Permit & Applicability and Task Definition—must be created and named appropriately for use as your facility database files.

Getting And Implementing IntelliRegs Program Updates

"Program Updates" to IntelliRegs are made in two ways:

1.) IntelliRegs Program Upgrade/Version changes
2.) Upgraded Knowledge Base, WizBase.mdb changes

   a.) IntelliRegs Program Upgrade/Version changes are made to enhance IntelliRegs program features and functions. The change is implemented by downloading the IntelliRegs.mde upgrade file from PDC's website, and replacing existing IntelliRegs.mde with the upgrade file. The IntelliRegs startup screen identifies the version number and revision date to confirm that the latest version is in use.

   b.) Update/Revision of the Knowledge Base, WizBase.mdb, is made by downloading the latest update of WizBase.mdb from PDC's website and replacing the existing WizBase.mdb with the downloaded, latest version. The Knowledge Base contains TCEQ OP-UA Forms (prior, revision data mapping, valid values), RRT flow logic (revised formulas based upon latest revisions) and maintains the OP-UA Form to RRT mapping schedule. WizBase.mdb updates are made on an "as-required" basis. Users are informed when Knowledge Base upgrades have been posted for download.

D. Startup

<u>Startup IntelliRegs From The Compass – IntelliRegs Selection</u>

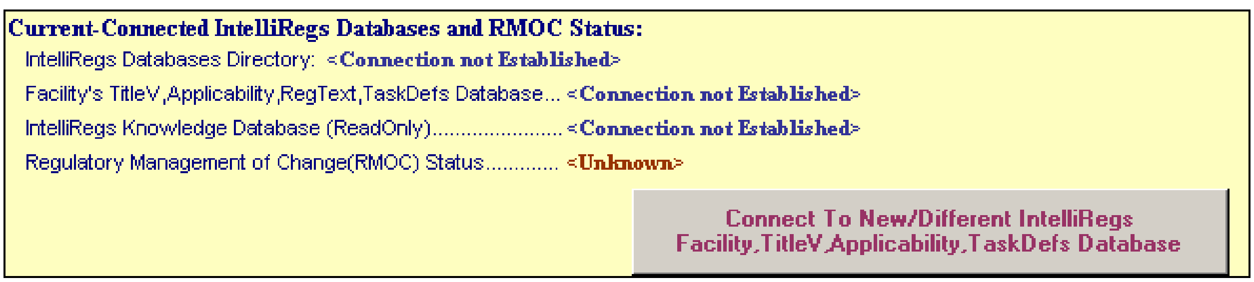
Following installation from the CD and restart of your workstation, (to insure all IntelliRegs registrations have been made), startup IntelliRegs! From Windows **Start** button…, select Programs…, Compass…, and then select the **IntelliRegs** startup icon. (If startup does not run properly, refer to **Special or Custom Installation Instructions** in this User's Manual section for corrective actions.)

If installed properly, the program will startup and display the ***IntelliRegs Main Startup Screen***. If the program indicates that database connections are not correct, please refer to the *Connect to Databases and Customize for Your Facility* paragraphs to understand and take steps to achieve a successful startup.

<u>Startup Checks IntelliRegs Files Before Opening The Startup Screen</u>

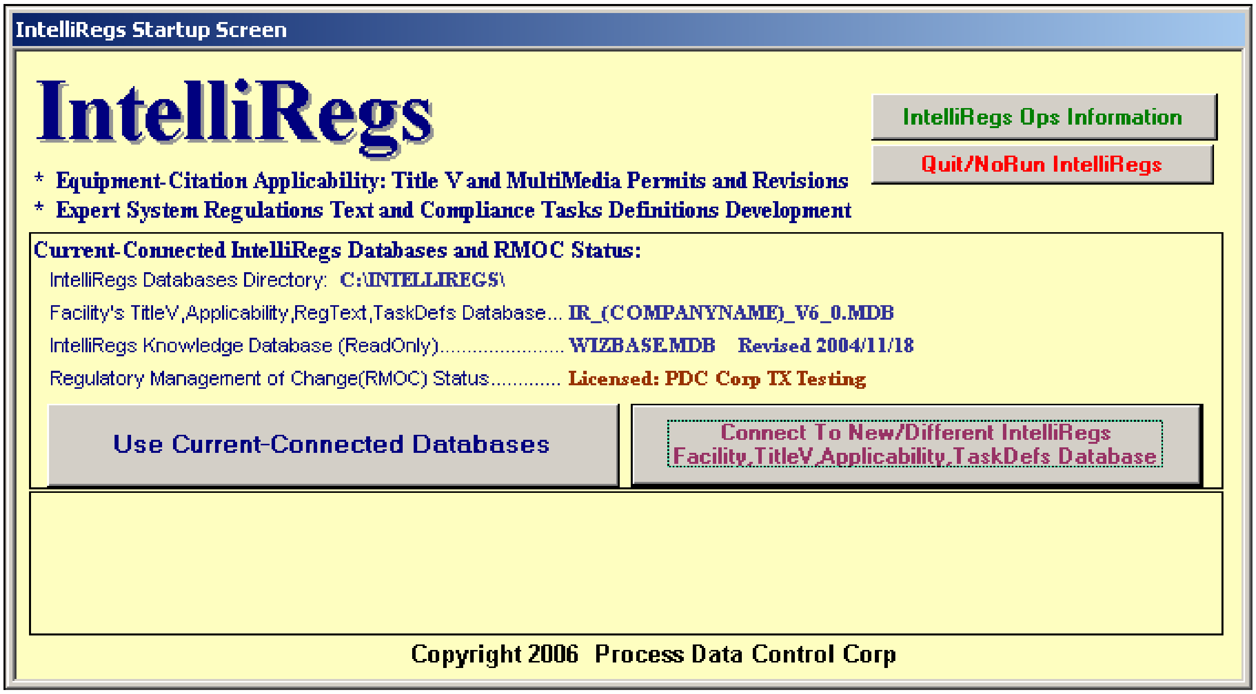
Startup confirms that database files exist and that all tables are properly linked.

Every time IntelliRegs starts up, it checks to verify a valid link with all required database tables from the WizBase, and IR_* database files. If any links are not correctly reestablished, then the **Use Current-Connected Databases** button will not be displayed. You must then perform the **CONNECT** activity from the Main Startup Window. (See Instructions in the **Connect to External Databases** paragraph in this User's Manual section.)



This validation operation at startup insures that the database links exist properly before attempting to use the table error (and get a runtime error) while running the program.

When the program startups up and offers the **Use Current-Connected Databases** button at the startup screen, you can be assured that all external tables are properly linked.



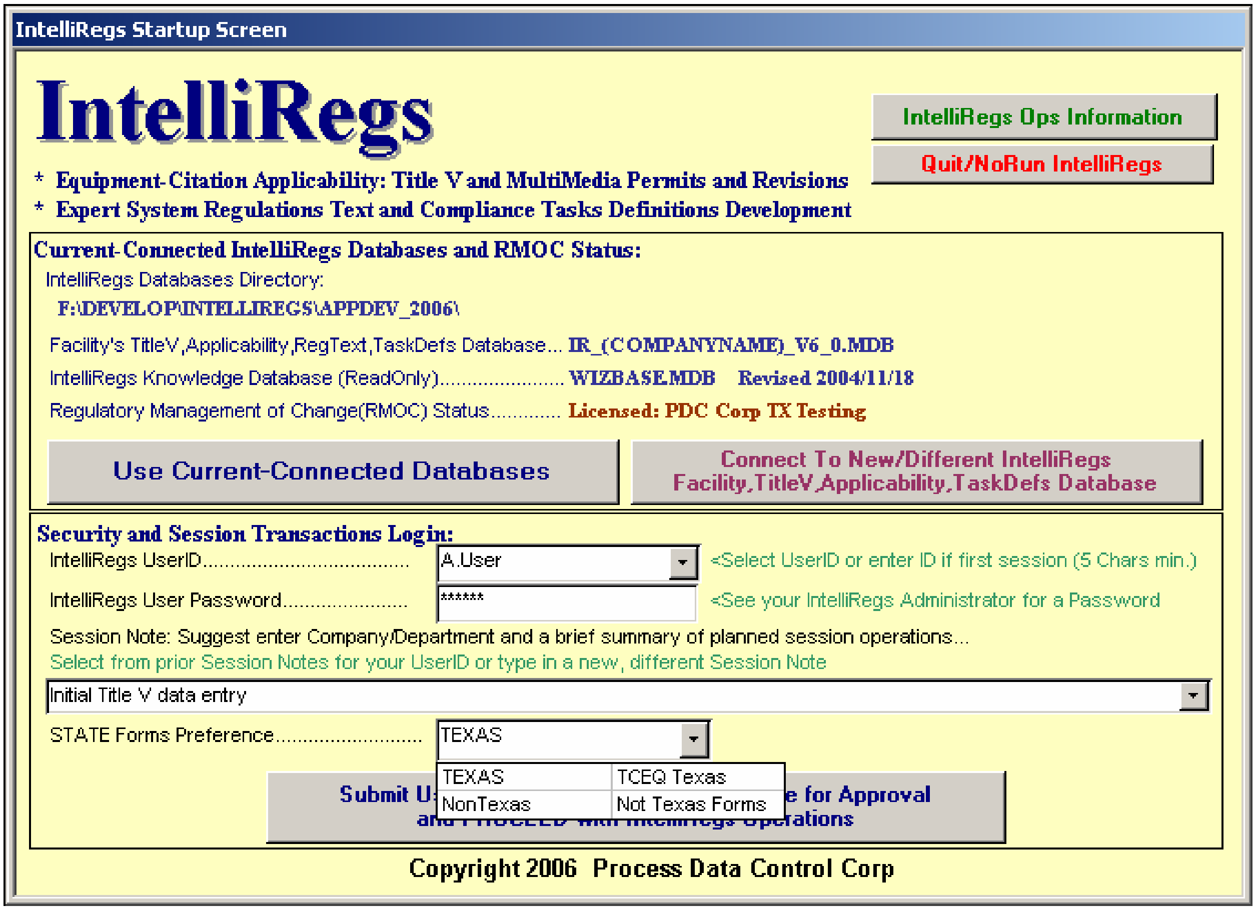
Startup checks to verify that database file structures are latest specifications, if not… auto update is performed if required.

In addition to validating each linked table connection, the Startup routine examines the table structures of the IR_*.mdb to see that the latest database table structures are present. Following upgrade of the IntelliRegs.mde, it is likely that changes in the table structures will be required. If so, an informational message box will be displayed indicating that an automatic Database Upgrade is going be performed to revise the table structures of your old tables into the new, revised, required table structures.

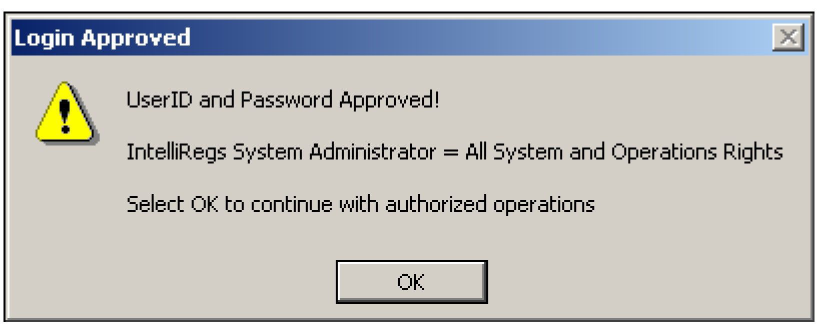
Database Update changes might add fields to a particular table, add an entire new table, or change the width or valid function specifications for an IR_*.mdb table. By automatically updating the database structures at the first startup of an IntelliRegs.mdb program upgrade, the external facility database structures are converted to the latest version structures without having to send those databases to PDC or run separate utility files to perform the structure updates. The validation of database structures also insures that no runtime errors will be experienced when accessing new or changed data elements, because the databases are verified as latest version before enabling program operations to proceed.

The IntelliRegs Main Startup Window: Proceed, Connect, or Quit

Following successful startup the ***IntelliRegs Main Startup Window*** will be presented as shown below:



The example screen above shows the window, as you will normally see it, ready to enter User ID, Password, Session Note, and whether you are a Texas or NonTexas user. After successful LogIn, the ***Login Approved*** message will appear. Select OK to continue with IntelliRegs operations.



If the database link was not validated then the **Use Current-Connected Databases** button will not be enabled and you must chose **Connect To New/Different…** or **Quit**.

For CONNECT instructions, see the **Connect to External Databases** paragraph in this section of the User's Manual.

Checkout IntelliRegs Using The Demo Databases/Default Setup

Following the initial startup at a workstation following a full IntelliRegs installation, it is recommended that you proceed to run test operations using the demo data (IR_Demo1.mdb), which is provided with installation and should be the connected database on the initial startup.

Testing of the program using the **Demo1 database should confirm proper program installation. Should problems be experienced, the installation configuration should be examined and problems corrected before proceeding with operations with your actual facility databases and/or access to facility databases located in remote=server directories.

Starting Up IntelliRegs After A Program Or Knowledge Base Upgrade

Following the replacement of a prior IntelliRegs.mde with a newer/updated file, the program will attempt to connect to c:\IntelliRegs\IR_Demo1.mdb database (the default/initial database settings as in a "new" IntelliRegs.mde). This is because your prior connection settings were in the old IntelliRegs.mde file!

Following startup of the new IntelliRegs.mde, you will need to CONNECT to your facility database tables. After establishing the connections, the connection to your facility tables will be made for the next startup of IntelliRegs.

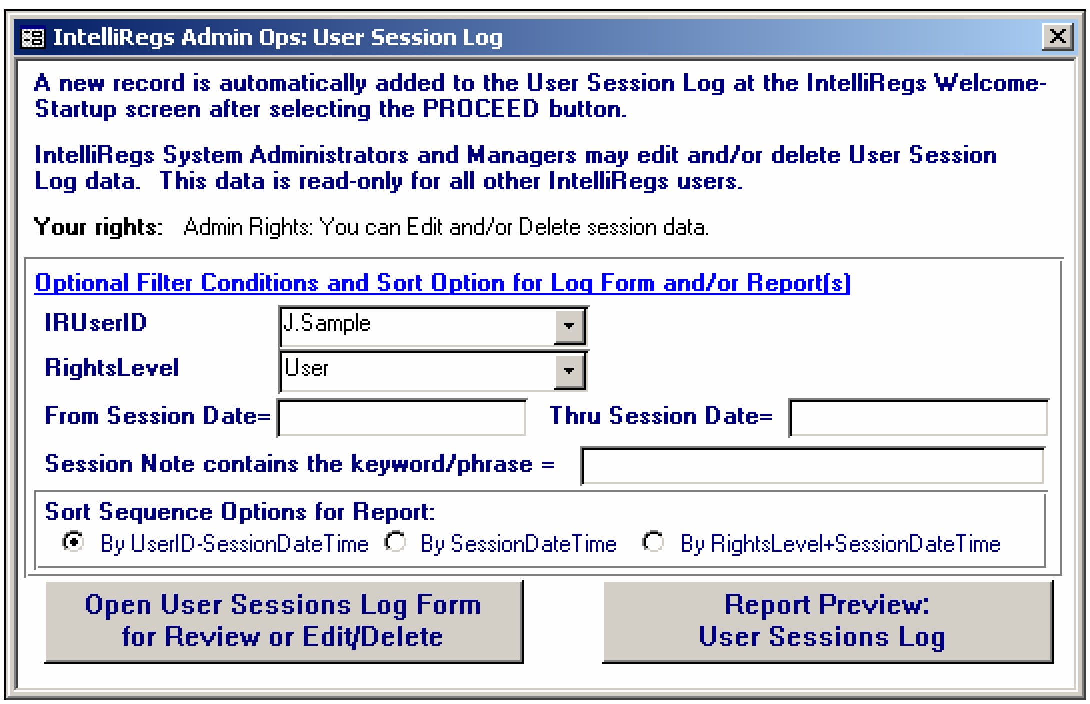
E. Security

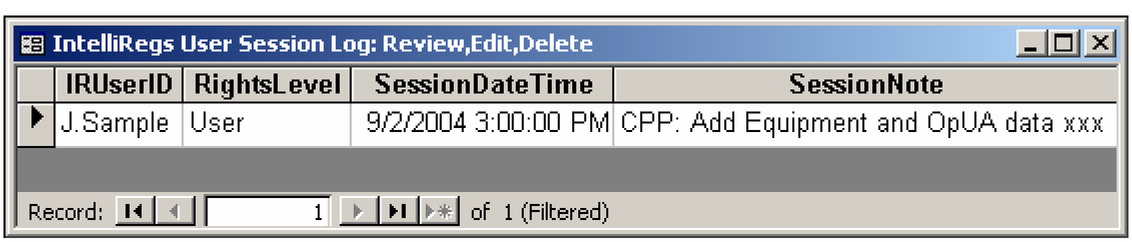
Overview

IntelliRegs Security features ensure that only authorized users access the program and enable the program to recognize a users' rights level and UserID determining operation capabilities and recording the userID for the Session log. There are four levels of security:

1.) Administrator - Maximum rights, Security and Operations, and database and program.
2.) Manager - Full Add/Edit/Delete rights for Operations and Changes
3.) User - Add, edits, and deletes.
4.) ReadOnly - No Add/Edit/Deletes = Read and Report only

The Administrator has access to all levels of the program including security code edits and security reports. Managers may do Permit change authorizations and status edits, but not security edits. The Base User may do managed edits, adds, and deletes. The ReadOnly level user is only able to view data and generate reports. UserIDs and Security Codes are assigned by the IntelliRegs Administrator.

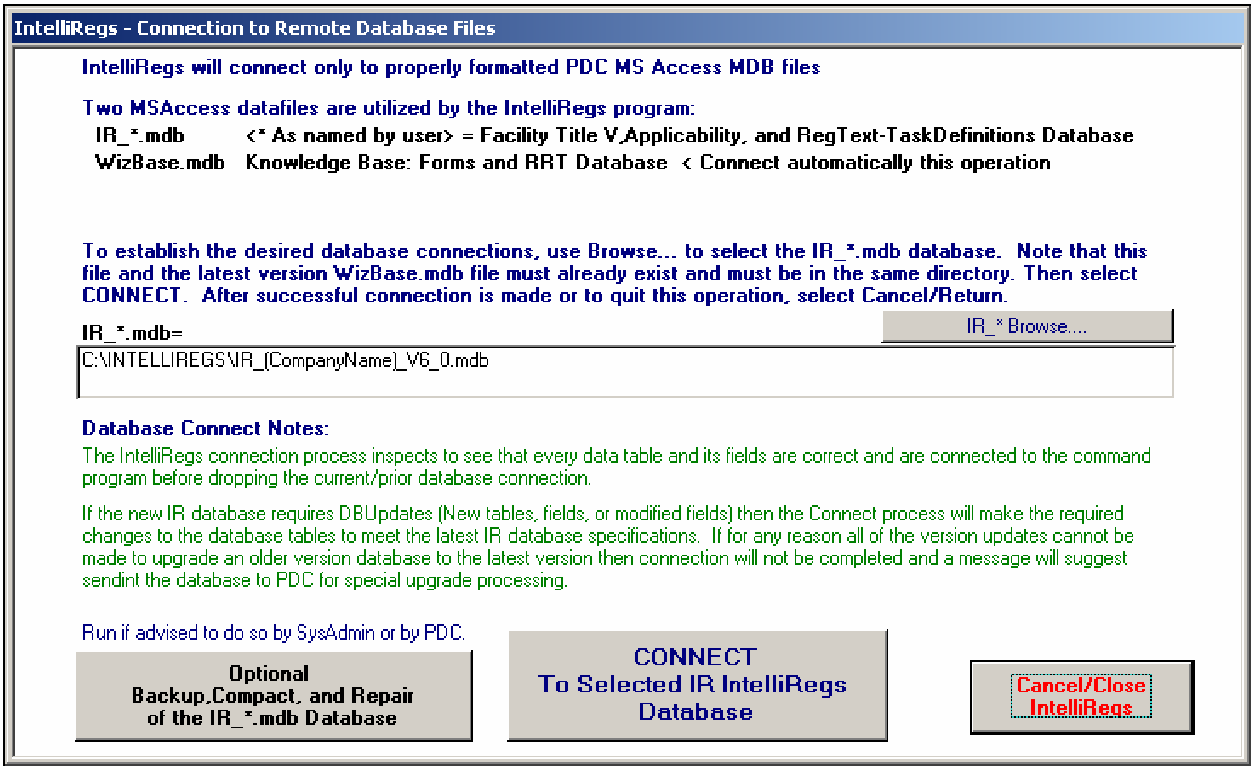




F. Connection to External Database

<u>The Connection Dialog Window: Selecting And Making New Connections</u>

Following selection of the **CONNECT** command button on the IntelliRegs startup the ***Connection to Remote Database Files*** dialog window is opened as shown below:



Select the **IR_*.Browse…** button, then select the desired IR*.mdb facility database, then select the **CONNECT** button to connect to the databases.

> **Note**: WizBase.mdb must be located in the same directory i.e. all files must exist in the same directory or the connect will not be permitted. Also, extensive database analysis is performed to confirm that the database is a properly configured IntelliRegs datafile. If the file is an IntelliRegs datafile but requires DBUpdates to conform to the latest specifications, then the updates will be made automatically (a one-time operation) prior to acknowledging successful connection.

After connecting to a different IR Database, you will be required to LogIn as each IR_database has its own valid UserIDs and Security Codes. (See Security LogIn)

Also available from this screen is the Backup, Compact, and Repair feature. It is recommended that you run this feature on a regular basis to avoid loss of data.

G. General Data Entry/Program Use Notes

Navigating The Program: Command Button Selection and Menu Bar Selections

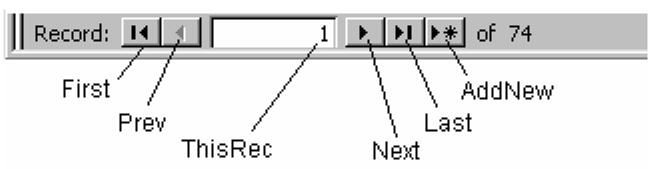
Navigating, i.e., moving from window to window and program operation to operation, is performed by selecting Command buttons and/or selecting menu bar icons or items from drop down listings.

The selections required to run particular program operations are indicated in each section of this User's Manual. Just follow the sequence of selections to get to the desired operations screen. It is **strongly** recommended that you disable the MS Office AutoCorrect feature for (c)→©, (a)→@, (i)→(I), etc. to allow correct data entry in the program. This may be done by going to the *Tools* menu, *AutoCorrect* selection in any MS Office program.

Data Window Record Operations: Next, Prev, Last, First…. Form Or Datasheet

Moving from record to record when working with a data entry screen is performed using the **Next**, **Prev**, **Last**, **First** and other record navigation functions. In addition, some users find it advantageous to switch from Form to/from Datasheet views to perform different data entry and record navigation functions.

Record navigation is made from the navigation bar visible on each data entry screen. An example navigation bar is shown below identifying the key buttons used:



> **Note**: You can "jump" to any desired record number by directly entering the number into the record number cell and then pressing the **<ENTER>** key on your keyboard.

Other navigation and format functions are available from the IntelliRegs menu bar as shown and identified below:

A review of several of the navigation and presentation commands:

Use ***Form View*** and ***Datasheet View*** to switch format of data entry and review at data entry windows. In some processes, such as multiple entry or review of a single cell for many rows, the Datasheet View may be preferred. Where user prompts and form instructions are beneficial, then the Form View may be preferred. The datasheet view is often preferred to make multiple row deletions (On some form screens, the record selector bar is not present requiring the datasheet view for selecting and making deletions!)

Use ***Find*** to find a value in a particular field. A dialog box will appear following selection of Find which will enable additional find specifications to be made.

Use ***DSFormat*** to revise the format of a datasheet view by freezing columns, and other options, to enable panning for display of only desired rows.

<u>Adding And Editing Data Using MS Access Windows Capabilities</u>

Data entry windows of IntelliRegs provide for the review, edit, adding of new data records and record deletion. The procedures and methods for data edit, add, and deletion are similar for all data entry windows. Several instructional notes are applicable:

Saving Data Edits and Adds: IntelliRegs saves your edits and adds without you having to select any **SAVE** buttons. All data is saved when the data entry window is closed, or whenever you move from one record to another record. Data is saved on a record by record basis not based on your data entry session.

Add New: New records are added by "walking off" from the last existing record to a new unused record and entering data that "adds" those data values as a new record. At the record navigation bar select the ***** icon for add new or just select the next arrow command when at the last record. The new record data values will appear with all data blank. Enter data for the new record. When you close the window, or move back or add a new record, your data for the new record will be saved.

> **Note**: If you did not enter any required data, or if any entry is not valid, you may get an error message telling you of the data entry validation error. You may correct the error and then attempt to move-off and save.

Escape key clears a Lockup situation: Occasionally you will want to abandon entry of a cell or of a record. This may seem extremely difficult to do unless you do multiple presses of the **<Escape>** key on your keyboard. Escape flushes entries and should enable you to "clear" cells and records if you have any difficulties doing so!

Deleting Records: Deletions should be made with care since deleted records cannot be restored following the delete action. Delete a record (or several records in datasheet view) by selecting the record selector column/button, which changes from gray to black when selected. In datasheet view, the entire row(s) will be "selected" black when selected. Press the **<DELETE>** key on your keyboard to perform the deletion! In most cases, you will be asked to confirm OKAY your delete request.

<u>Saving And Restoring Your Facility Data</u>

You should save your facility databases occasionally to create archives from which your facility data could be restored if required. It is rare to need to restore your data from archives, but a power failure, corrupted database, or accidental data deletions could make such archives very important! The frequency of creating archives is up to you.

It is recommended that you create archive backups of the IR_*.mdb facility database file. You might wish to name the files and include the saved file date, such as IR_<Company Name>_yyyy-mm-dd.zip, and retain several of the latest dates.

H. Facility Databases

<u>What Do "Open" Databases Mean To You?</u>

Your datafile is "Open" for use as you desire. Your facility IR<Company Name> database is password protected. The password is known by your company's IntelliRegs System Administrator. This means that PDC software is not required for you to see or transfer your facility data.

I. Special Data Processing Operations

<u>Contact PDC For Assistance With Special Data Processing Requirements</u>

Batch data imports, edits, special reports, and other special processing requirement of IntelliRegs data may benefit by having PDC perform the special operations, or provide recommendations to users preparing and running the special processing.

J. Using IntelliRegs Data In PDC's System

<u>IntelliRegs Data Can Be the Foundation/Base For TaskTrakker Compliance Management Ops</u>

Applicability data, as determined in the Permit & Applicability operations, and Task Definitions, as created in the Task Definitions operations, can become the foundation/base data for the TaskTrakker Compliance Management Plan.

Data from IntelliRegs is exported to TaskTrakker in two export operations:

1.) Permit & Applicability Export
2.) Task Definitions Export

See instructions in this User's Manual for each export operation.

<u>Revisions To IntelliRegs Data And Updating CMP/TaskTrakker With Those Changes</u>

Following the initial export of Applicability and/or Task Definitions data to TaskTrakker, subsequent exports use the same export procedures. TaskTrakker's import processing effectively handles IntelliRegs' exports as "updates", editing and adding to data in the TaskTrakker database accordingly.

Permits & Applicability

This section of the IntelliRegs User's Manual provides instructions for Permit & Applicability operations. The functions within this program area were originally a separate application named Regulatory Wizard.

The Permit & Applicability functions within IntelliRegs enable efficient data processing to prepare, submit, and amend/maintain a facility's Permit related data. This includes equipment inventory, OP-UA unit attribute data, special applicability requirements, application history, and changes documentation. The program provides management reports, agency form facsimiles, and creates TCEQ electronic submittal files for OP-SUM, OP-UA, OP-REQ2, and OP-REQ3.

Title V processing determines applicability as reported in OP-REQ2 and OP-REQ3 forms. This applicability data can be transferred to the TaskTrakker Compliance Management Plan using the TaskTrakker-Export function. Applicability determination also indicates the citations to have task definitions developed using IntelliRegs Task Definitions operations.

Current versions of TCEQ OP-UA Forms and RRT logic are maintained by replacement of the Knowledge Base datafile, WizBase.mdb, as required. This enables efficient, effective change implementation providing documentation on UA form attribute value changes and/or RRT logic changes.

Please also see **Section 3** of this User's Manual for Permit & Applicability report examples.

IntelliRegs User's Manual

Section 2

Permit & Applicability Operation Instructions

Paragraph and Title **Page**

See **Section 3** of the IntelliRegs User's Manual for
Title V Permit & Applicability Attachments:

- Printed Report Examples

A. Introduction to Permit & Applicability

- ***Features Summary***
- ***IntelliRegs Menu Bar and Title V Permit & Applicability Selections***

B. Facility-Area: Facility and Area Identification

- ***Selection of Facility-FacilityArea Form and Data Entry***

C. Permits: ID, Name, IssueDate

- ***Identify Permits for which IntelliRegs data is entered.***

D. Equipment Inventory & Unit Attribute (UA) Data

- ***Adding a New Equipment Item (and Equipment Header Data)***

D1. Equip Info: Identification and Description
D2. OpStatus
D3. Equipment Significance
D4. Direct Applicability
D5. Rules and Form Data

- ***Form Data Entry***
  - ***HELP Button at the Form Table Data Entry Screen***
  - ***RRT Decision and Compliance Block Status Based Upon Form Data Values***
  - ***RRT Decision Flow and Applicable Citations Determination***
  - ***RRT Overrides***
  - ***RRT Determined Citations***
  - ***Special Regs for Equipment OPUA Data Entry***
  - ***Special Regs for Negative Applicability Reason***

D6. OPREQ2: Equipment-Direct Negative Applicability
D7. OP-SUM: Unit OP-SUM Default Values
D8. RegApplicability
D9. Title V Datasets

E. TV Import/Export

- ***Selection of Import/Export Operation***
- ***Data Import: Import Equipment Inventory Data***
- ***Data Export: Prepare Applicable Regulations for Export to TaskTrakker***

F. TV Utilities

- ***Selection of Title V Permit & Applicability Utility Operation***
- ***Run SOP Index No Auto-Assignment***
- ***Run Old to New OP-UA Form Data-Transfer***
- ***Run Deletion of ORPHAN Data***
- ***Run RRT Flow Review/Update***

G. TV Submittal Nos

- ***Add/Edit TV Submittal Nos***

H. TV Special-Regs-Fast

- ***Data Entry for Special Regs***

I. TV UA-KeyData-Fast

- ***Data Entry of Key Data***

J. TV OpUA Profiles

- ***Create/Edit OpUA Profiles***

K. Permit and Applicability Reports

K1. Equipment Management Reports
K2. Unit Attribute Reports
K3. CM Knowledge Base
K4. Direct Applicability

A. Introduction to Permits & Applicability

Features Summary

The Permits & Applicability operation enables facility, area, equipment, and equipment-related data to be efficiently created, revised, maintained, and reported. The program outputs management reports, Title V forms, and creates TCEQ approved Title V electronic submittal files.

The general sequence of processing is:

1.) Identify Facility and Areas

2.) Identify Equipment and indicate Title V reportable status

3.) For Title V equipment, enter OP-UA data for all applicable OP-UA forms

4.) Enter equipment-direct negative applicability citations and OP-SUM values

5.) Run OP-REQ2 and OP-REQ3 and identify any citations to be removed or added to the RRT-determined negative applicability and/or applicability

6.) Enter citation adds/removals for negative applicability or applicability as Special Regs. Rerun OP-REQ2 and OP-REQ3 to confirm as desired.

7.) Enter as Special Regs all equipment direct citation applicability for any OP-UA form determined applicability not provided by IntelliRegs i.e. UA12.

8.) Create dataset(s) using Reports: Title V, output reports.

9.) Revise and recreate datasets until satisfactorily then edit any ad-hoc required edits of the dataset values.

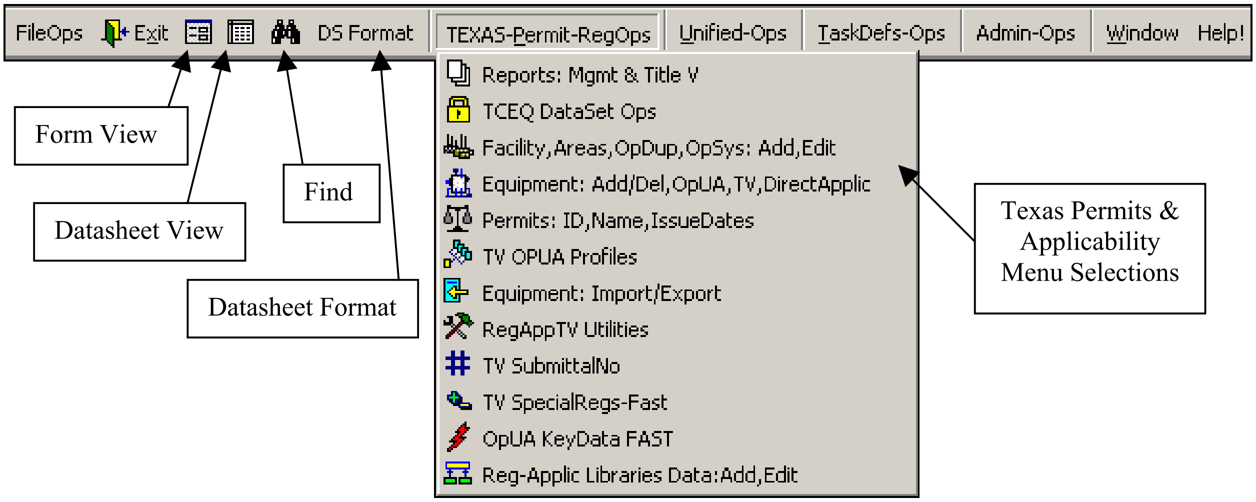
10.) Generate application or amendment from the dataset including printed file versions and EFile submittal files.

11.) Export applicability data to TaskTrakker for Compliance Management

12.) Upon revision and changes revise steps 1 through 11 as required.
∗ At any stage, run reports to document your Title V data status.

IntelliRegs Menu Bar and Permits & Applicability Selections:

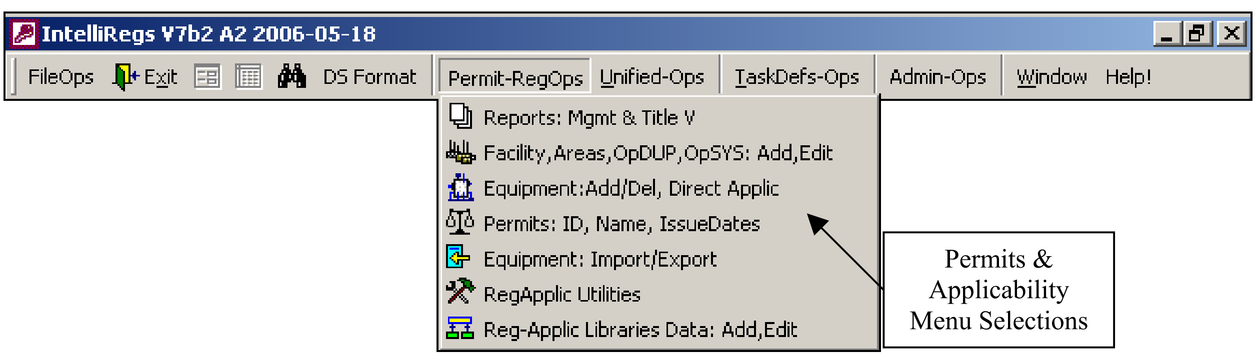
For State Forms Preference=Texas Users (*As selected at StartUp Screen*)



Texas Permits & Applicability operations forms and format settings are selected from the IntelliRegs Menu Bar shown above. Note that the Equipment Inventory & UA form may be optionally opened following selection of **PROCEED with IntelliRegs Operations** from the IntelliRegs Startup screen.

For State Forms Preference=NonTexas Users (*As selected at StartUp Screen*)

The following menu selections are available:



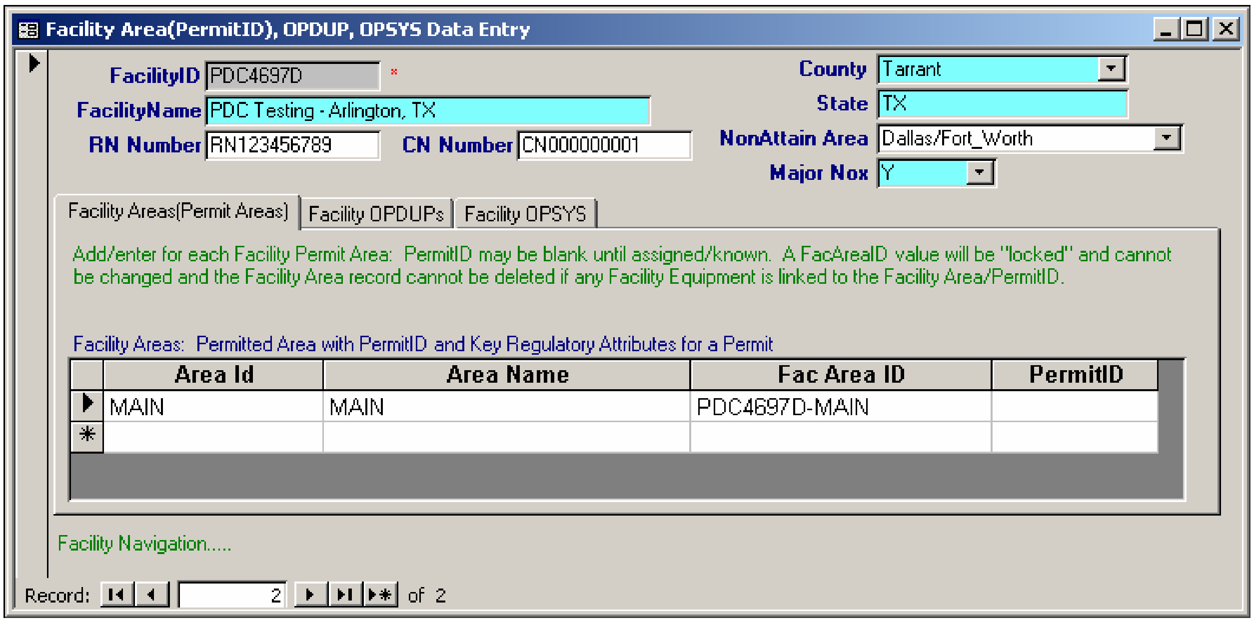
∗ See separate IntelliRegs Users Manual for NonTexas State Forms Preference.

B. Facility-Area: Facility and Area Identification

Selection of Facility-FacilityArea(Permit ID), OPDUP, OPSYS Form and Data Entry

Enter Facility, Facility-Area, OPDUP, and OPSYS data for your facility before proceeding with other Permit & Applicability data entry. Each equipment item will be "linked" to a particular Facility-Area, OPDUP, and OPSYS.

To begin Facility and Facility-Area data entry, select *Facility, Areas, OPDUP, OPSYS* from the IntelliRegs... *TEXAS-Permit-RegOps* menu bar drop-down list.



For general information on IntelliRegs data entry (add, edit, delete, etc.), see **Section 1: General IntelliRegs Data Entry Instructions**.

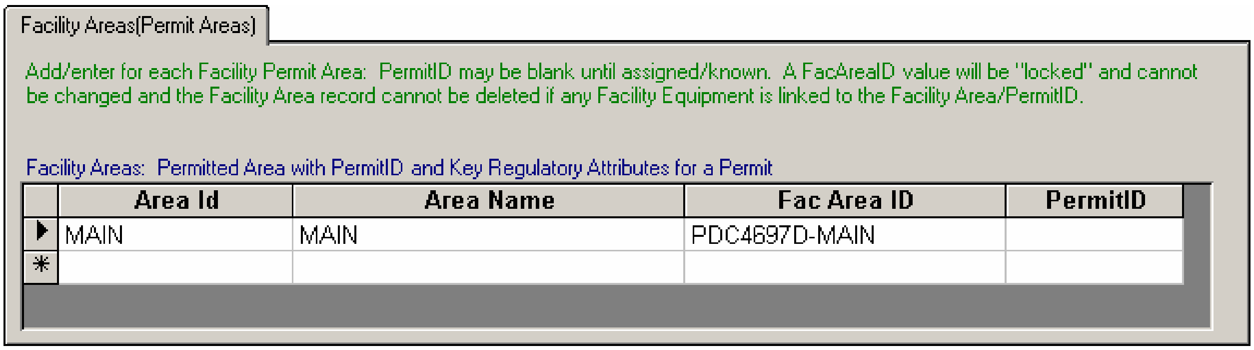
<u>Facility Data Entry</u>: Enter a value for all presented cells:

FacilityID:	TCEQ account number, 7 characters wide, all capitals
FacilityName:	TCEQ account name for facility , Max 50 wide
RN Number:	TCEQ Regulated Entity Number. This replaces the former account number.
CN Number:	TCEQ Customer Number. Unique number assigned to company that applies to all facilities and sites.
County:	Select from county drop-down list, or type in county if not on selection list.
State:	Type in the two letter abbreviation for the state.
NonAttain:	Select from non-attainment drop-down list, or type in if not on selection list.
MajorNox:	Y=Yes, or N=No for Facility

<u>Facility-Area Data Entry</u>: Add Facility–Areas for all areas to be reported. Areas in the IntelliRegs program should refer to the actual Title V Permits groups. (Use OpDUP for department/business unit assignment), or may be process units that will be combined to form a

Title V Permit "application area". IntelliRegs can combine "Facility-Areas" for review and reporting. It is therefore important to identify Title V Permit Areas properly.

Add, edit, or delete Facility-Area data at the ***Facility Areas(Permit Areas)*** data entry window:



AreaID: Enter a short name/id for the area. Do not have any spaces in the name. Max 15.

AreaName: Area name, i.e. Process Name. Max 50. Not necessary to include the facility name in the AreaName.

> **Note**: This will be the default name for the permit submittal for an area, but it can be edited for the actual submittal in the Title V datasets.

FacAreaID: This will be used for you to select the Facility-Area for equipment and reports. It is an internal IntelliRegs field (not submitted!). Usually this is a combined Facility plus AreaID value, i.e. JE1111J-BoilerFarm1. Max 28 wide, no internal spaces.

> **Note**: After entering your Facility and Facility-Area data, you may delete any/all temporary or demo data rows.

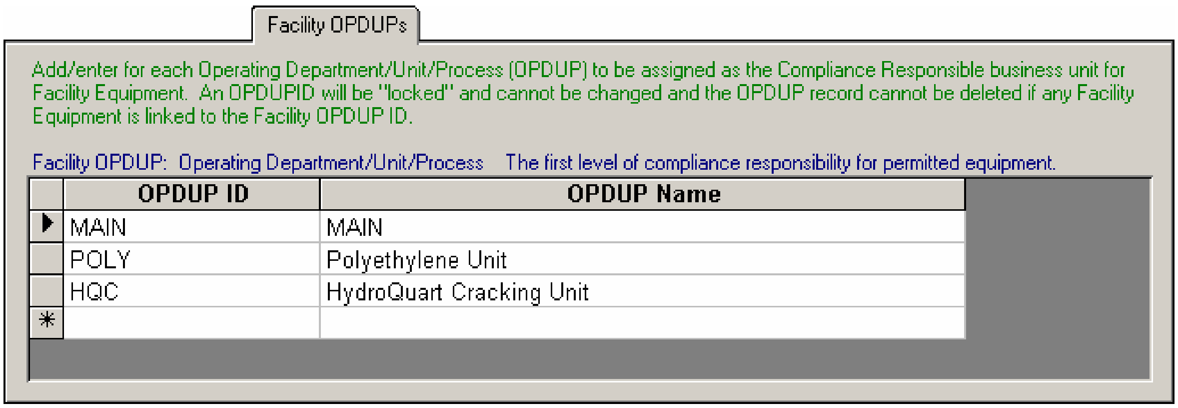
Permit ID: The identification number of your Title V Permit.

Notice/Warning:

The IntelliRegs program will "link" equipment data and other data to your selected Facility-Area. Therefore, if the Facility-Area ID is changed, all equipment items previously linked to the old/previous Facility-AreaID would need to be edited to select the new Facility-AreaID. It is recommended that you carefully establish the FacilityID and Facility-Area Ids and so that changing of the Facility Equipment assignments will only be required only if a major Title V Permit revision, reassignments occur.

Facility OPDUP:

"OPDUP" is a term used by the IntelliRegs for the business management assignment defined as the Operating Department, Unit, or Process. Whatever the terminology used by your company for its business organizational structure the OPDUPs should reflect the management entities to which Facility Equipment is assigned for regulatory compliance responsibility.


Facility OPDUPs

Add/enter for each Operating Department/Unit/Process (OPDUP) to be assigned as the Compliance Responsible business unit for Facility Equipment. An OPDUPID will be "locked" and cannot be changed and the OPDUP record cannot be deleted if any Facility Equipment is linked to the Facility OPDUP ID.

Facility OPDUP: Operating Department/Unit/Process The first level of compliance responsibility for permitted equipment.

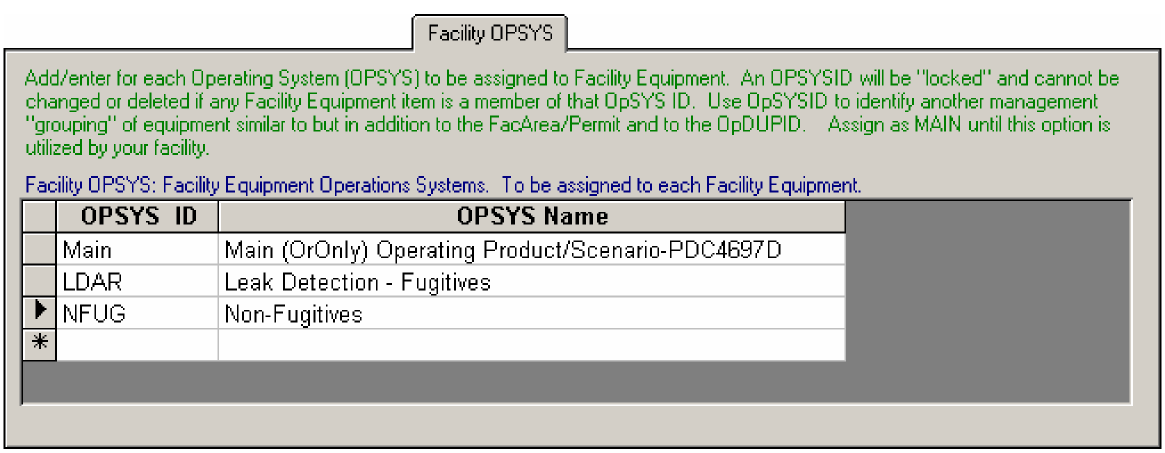
OPDUP ID	OPDUP Name
MAIN	MAIN
POLY	Polyethylene Unit
HQC	HydroQuart Cracking Unit

You must identify the OPDUPs for your Facility to have them ready for assignment to each Facility Equipment item. On occasions companies may employ a "MAIN" OpDUP as a general, not-yet-assigned department and later create and assign the actual OPDUPs.

Facility OPDUP Data Entry: IntelliRegs data entry forms, reports, and exports may be selected and/or are sorted-grouped-subtotaled by OPDUP IDs. Note that Facility OPDUP assignments to Facility Equipment are not dependant on the assigned AREA or OPSYSID assignment. In other words OPDUPs may be a subset of AREA or may optionally cross multiple AREAs as appropriate for your facility.

Facility OPSYS:

"OPSYS" is a term used by the IntelliRegs for Operating System assignment of Facility Equipment. Each Facility Equipment item (Regulated Entity) must be assigned to one and only one OPSYS. The valid OPSYS values for each Facility are created, edited, and deleted from the IntelliRegs Facility-Areas screen at the Facility OPSYS tab.


Facility OPSYS

Add/enter for each Operating System (OPSYS) to be assigned to Facility Equipment. An OPSYSID will be "locked" and cannot be changed or deleted if any Facility Equipment item is a member of that OpSYS ID. Use OpSYSID to identify another management "grouping" of equipment similar to but in addition to the FacArea/Permit and to the OpDUPID. Assign as MAIN until this option is utilized by your facility.

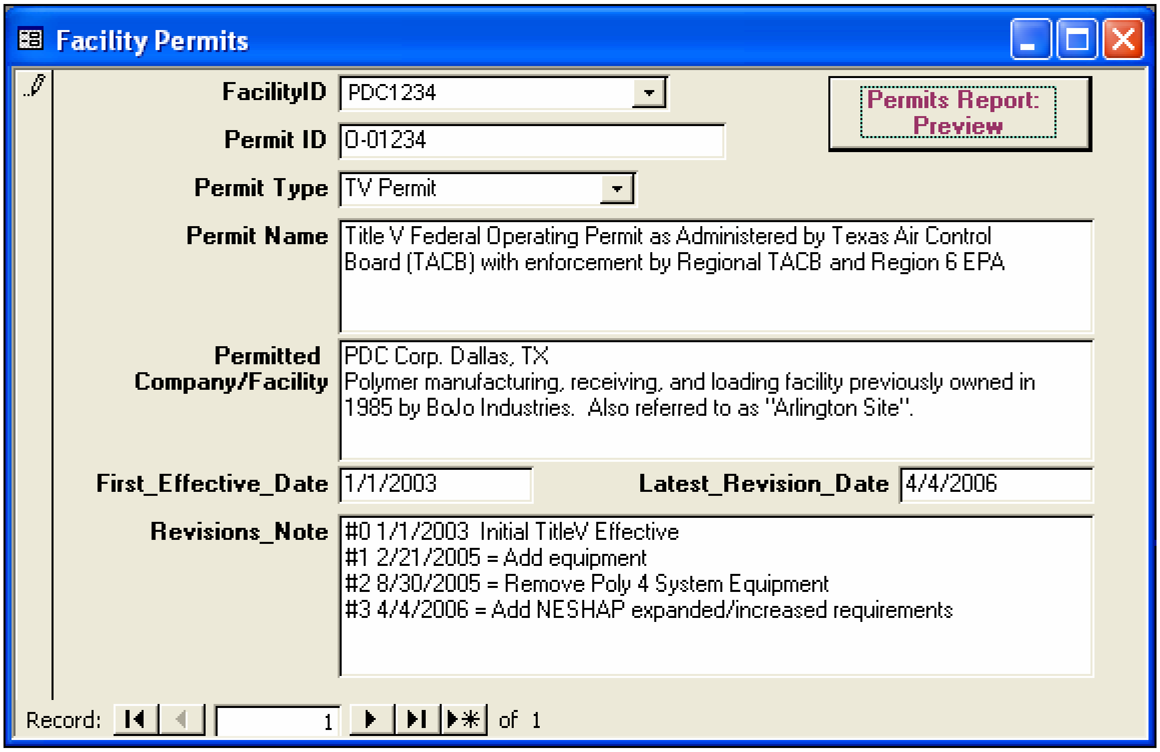
Facility OPSYS: Facility Equipment Operations Systems. To be assigned to each Facility Equipment.

OPSYS ID	OPSYS Name
Main	Main (OrOnly) Operating Product/Scenario-PDC4697D
LDAR	Leak Detection - Fugitives
NFUG	Non-Fugitives

Example OPSYS are: NonFug and Fug, LDAR, TANKS, UTILS, OPS, and OTHER.

C. Permits: ID, Name, IssueDates

The PERMITS table in the IntelliRegs facility database stores information on Facility-Permits. This data and it's reports are not agency reported and optional.



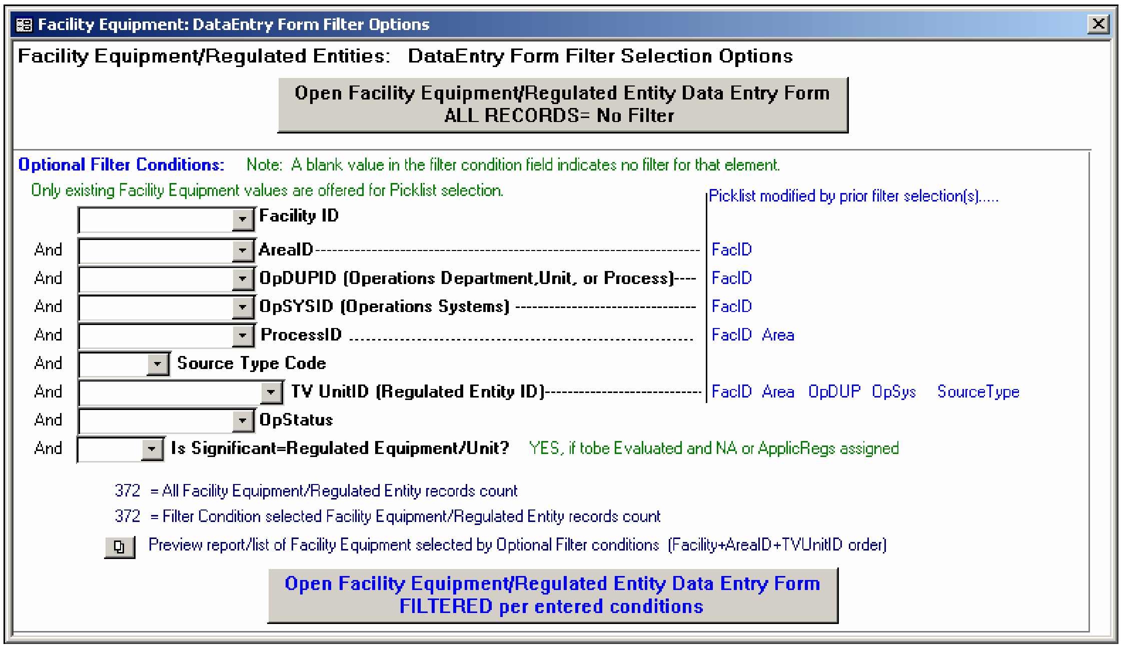
It is suggested that all Title V, NSR, and other permits for which data is entered into your IntelliRegs system be identified in your PERMITS data. The Revisions_Note field is a "free-form" memo field able to contain up to approximately 32,000 characters. Use it as desired to record version notes and other permit-related information.

Permit Reports Preview:

Select this button to preview and optionally print the Facility-Permit data.

D. TV Equipment Inventory & Unit Attribute (UA) Data

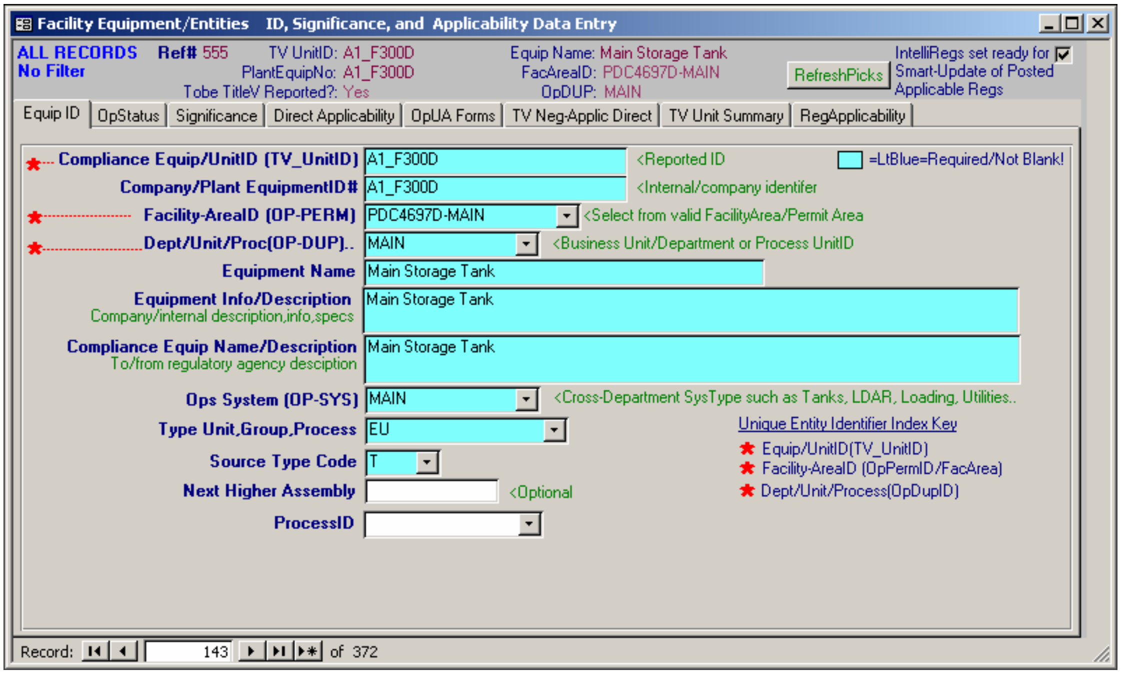
Creating and editing equipment identification data for your facility is an important part of your permits data. The ***Facility Equipment/Entities*** form is opened by selection from the IntelliRegs *TEXAS-Permit-RegOps* menu bar. A *Facility Equipment: DataEntry Form Filter Options* window will open optionally allowing the equipment to be filtered by Facility ID, Area ID, OpDUPID, OpSYSID, Source Type Code, or TV UnitID, OpStatus, or Significant. Reports may also be run, based upon these filters, from this screen.



Note: Adding of Facility Equipment should be preceded by the creation of Facility Area, Facility ODUP, and Facility OPSYS values which are required assignment fields for each Facility Equipment record. (See **Section 2-B TV Facility-Area**)

Adding a New Facility Equipment Item

Equipment data may be entered by import from source files. (See **Section 2-D: TV Import/Export**) or may be entered directly at the ***IntelliRegs Facility Equipment Data Entry*** screen. If the equipment items were imported, then identification data elements should be reviewed to see that default and/or import values have been correctly set. If all equipment was not imported, then you will want to add new equipment items as required.



Form Header Data Items: Displays key data in the "header" of the Facility Equipment form. The values are not editable at the header cells displaying the current values for those key data elements which can be edited in the forms "tab" operations.

<u>Ref#</u>: The program assigns a unique identifier to each equipment item. This RefID is not editable by the user and will always "point" to this equipment item unless/until the equipment item is deleted. Also referred to as the **EquipRefID** in IntelliRegs reports and selection dropdown lists.

<u>TV UnitID</u>: The "permit-reported", agency-recognized identifier for the Facility Equipment item. Displayed on submittal forms and reports for **UnitID.** Enter at the EquipID tab.

<u>PlantEquipNo</u>: The company/facility internal, alias, identifier number for the Facility Equipment item. In most/many cases this is the same value as the TV UnitID but is not required to be the same. Useful to establish a "cross-reference" to other/different regulated entity identification values such as in P&IDs or maintenance or asset management databases.

<u>To Be Title V Reported?</u>: Yes if UnitID is identified in the Title V Permit. Edit at the Significance tab.

<u>Equip Name</u>: Displayed at the equipment header, this is entered at the **Equip ID** Tab entry.

Facility-AreaID: Displayed at the equipment header, this is selected from the dropdown at the **Equip ID** Tab.

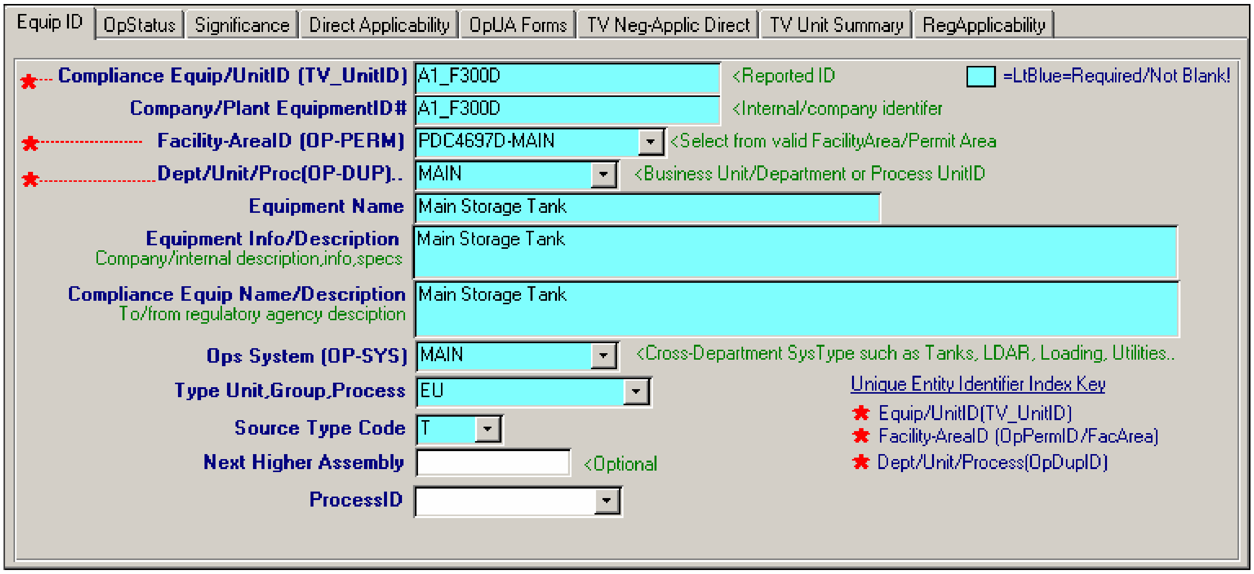
OpDUP: Displayed at the equipment header, this is selected from the drop down at the **Equip ID** Tab.

Facility Equipment data review and edits at the following "tab" operations:

- **Equip ID**
- **OpStatus**
- **Significance**
- **Direct Applicability**
- **OpUA Forms**
- **TV Neg-Applic Direct**
- **TV Unit Summary**
- **RegApplicability**

Instructions for each data entry process are presented in individual following sections of the User's Manual.

D1. Equip Info: Identification and Description



EquipID Tab: The **EquipID** Tab is one of eight tab operations available at the FormScreen ***Equipment Operations*** screen. When the tab is selected, key identifier data is displayed. You can edit data at the entry prompts. At the new data item screen, all cells for the equipment item will appear blank.

Compliance Equip/UnitID (TV_UnitID): This is the "UnitID" value as to be reported on Title V OP-UA, OP-SUM, OP-REQ2, and OP-REQ3 forms. Although most accounts make this number the same as the EquipID# (the plant equipment ID number), it is not necessary to do so. For example, plant equipment item (EquipID#) FV22124 could be Title V reported as any other number, i.e. "TK004" if wanted! Care should be taken to see that the Title V Unit ID used is unique for the facility and that it matches satisfactorily with reported Emission Inventory equipment identifications, etc. IntelliRegs has no way of validating this value (other than requiring it to be a unique value!). Not Blank, 20 characters max.

Company/Plant EquipmentID #: Enter the unique Equipment ID number for this equipment item. This is normally the facility's internal identification number as appearing on maintenance information. Not Blank, 20 characters max.

> **Note**: This number is often also used as the Title V reporting Title V Unit ID, but in IntelliRegs the same number or a completely different number can be used. (See Tab: **TVUnit Info, UnitID** for more information on Title V Unit ID.)

Facility-AreaID (OP-PERM): Select from dropdown list. If the needed Facility-Area is not on the list, it must be added in the Facility Add/Edit operation. (See separate instructions) After adding the needed Facility-Area, return to the **EquipInfo** tab to select the Facility-Area.

Facility… and Area…. Values are displayed based upon your Facility-Area selection.

Dept/Unit/Proc(OP-DUP): Select from dropdown list. If the needed OP-DUP is not on the list, it must be added in the Facility Add/Edit operation. (See separate instructions) After adding the needed OP-DUP, return to the **EquipInfo** tab to select the OP-DUP.

Equipment Name: Enter equipment name. This should be the name as used at the Facility for the equipment.

Note: Another name can be used/reported as the "Compliance Equip Name".

Equipment Info/Description: Additional, longer description.

Compliance Equip Name/Description: Title V Unit name as to appear in the Name/Description data elements of OP-SUM report. Optionally, this name may be different than the equipment item name as in the plant maintenance equipment data.

> **Note**: The TCEQ indicates in OP-SUM instructions… "enter a text name or description for the unit from the PSDB whenever possible…. If no PSDB name currently exists, a new name that is consistent with the existing naming conventions must be provided by the applicant."

Ops System (OP-SYS): Assign a valid OP-SYS value selected from the drop-down list. Only existing, defined OPSYS values may be selected.

Type Unit, Group, Process: Select from the dropdown list. Not a TCEQ reported value! This is passed to TaskTrakker to categorize the equipment per Compliance Management System groupings.

Source Type Code: Select from the dropdown list. Not a TCEQ reported value! This is passed to TaskTrakker to categorize by Source Type for the Compliance Management System.

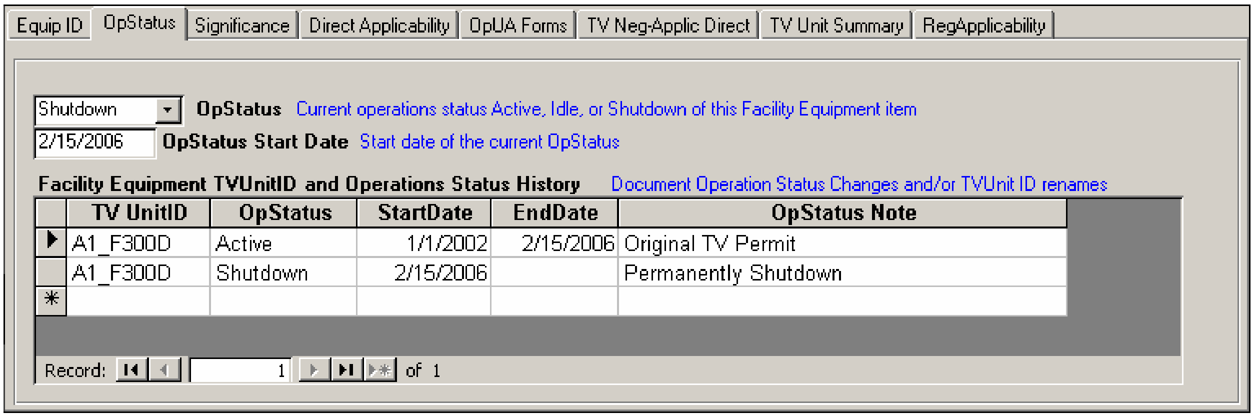
NHA: (Optional as/if needed) Next Higher Assembly If this equipment item is not Title V reported because it is a sub-component of a reported equipment item, then indicate the reported "Next Higher Assembly" equipment item. This will aid in review of the total inventory to record why a particular equipment inventory item was not itself reported.

ProcessID: (Optional as/if needed) User-defined Process identifier. Select from dropdown list or type in value. List identifies all Process IDs that have been assigned to equipment.

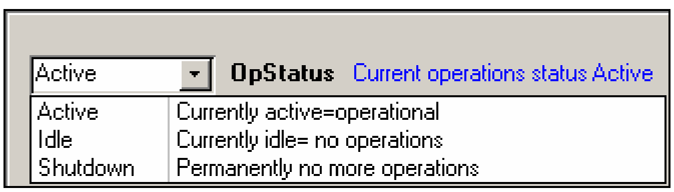
After entering at the **EquipID** Tab, proceed to select the **OpStatus** Tab for additional data entry.

D2. OpStatus

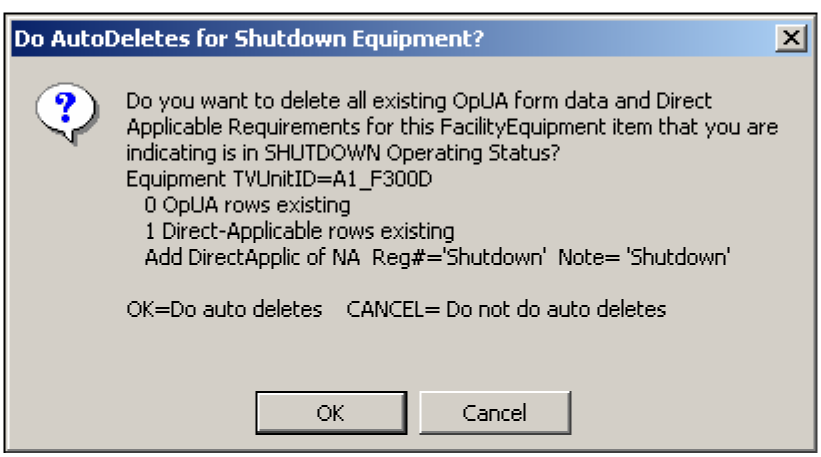
The **OpStatus** tab identifies the current equipment operations status and allows the user to keep track of equipment operations status history. Equipment with OpStatus="Idle" is communicated to TaskTrakker so that compliance history will not be kept during the Idle period. Equipment may be returned to the "Active" OpStatus so that compliance history will be collected in TaskTrakker.



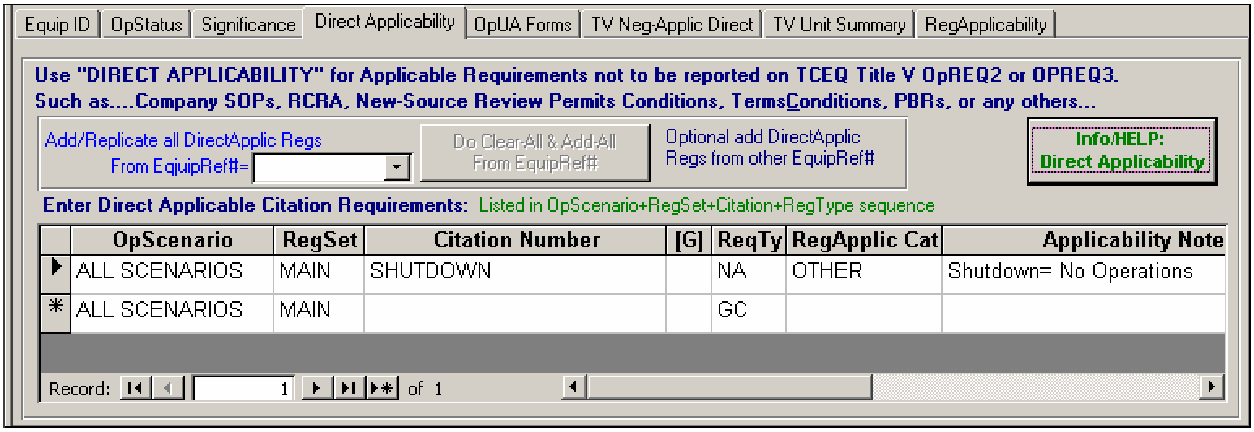
Select the equipment status in the **OpStatus** dropdown box.



When equipment is Shutdown, equipment history remains in IntelliRegs. When Shutdown status is selected, the program asks if you want to delete all applicability for this equipment. You may choose to mark the equipment as Shutdown, but not automatically remove the applicability. Compliance history would still have to be kept in TaskTrakker if you choose this option.

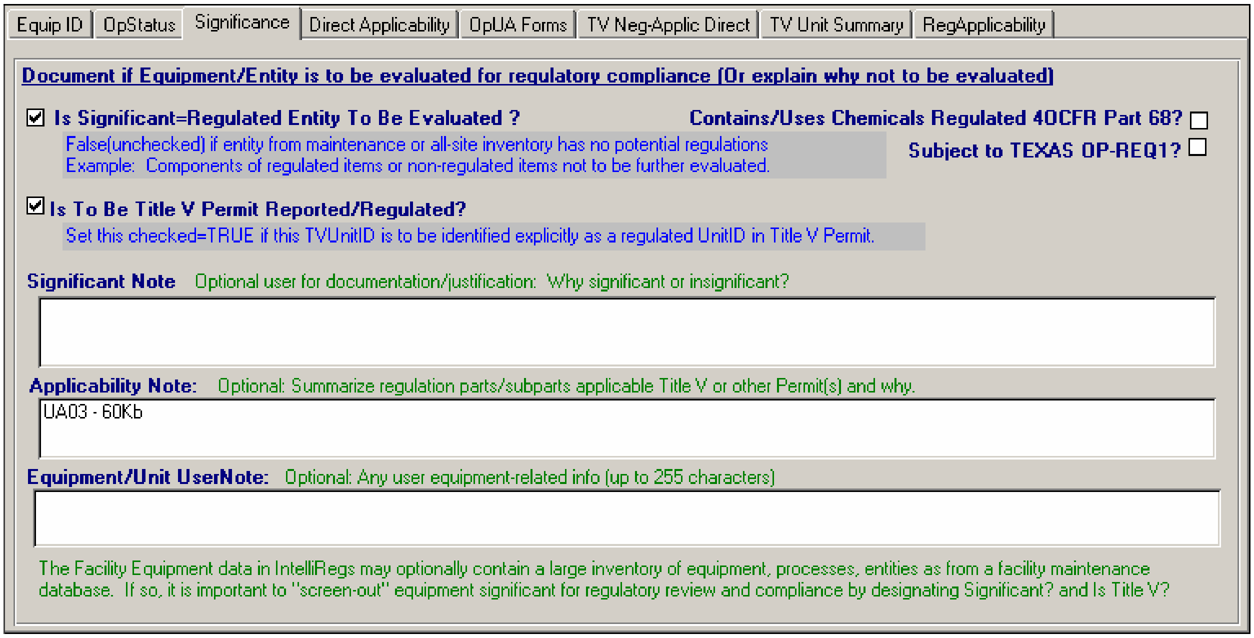


If you choose to delete all existing applicability, the program automatically deletes all existing OpUA rows and all Direct-Applicable rows. Then a single Direct-Applicable row is inserted to record the Shutdown.



After entering at the **Op-Status** Tab, proceed to select the **Significance** Tab for additional data entry.

D3. Significance



Significance Tab: *Evaluate Significance*: Check this if this equipment item is to be evaluated for TitleV significance. In general, only leave unchecked for the most obviously non-Title V items, such as if equipment inventory included such items as “sidewalks” etc. If *Evaluate Significance* is checked, enter data determining whether the equipment is “significant” for Title V reporting.

Contains/Uses Chemicals Regulated 40CFR Part 68?: Check=YES if contains any chemicals regulated by 40 CFR Part 68 – Chemical Accident Prevention Provisions

Subject to Texas OP-REQ1?: Check=YES if this equipment item will have regulatory requirements identified in the TCEQ OP-REQ1 permit application form which is/will-be stated in the Title V Permit's General or Special Terms and Conditions.

To Be Title V Permit Reported/Regulated?: Check=Yes if this equipment UNITID is/will-be explicitly identified as a Unit, Process, or GroupID in the Title V Permit.

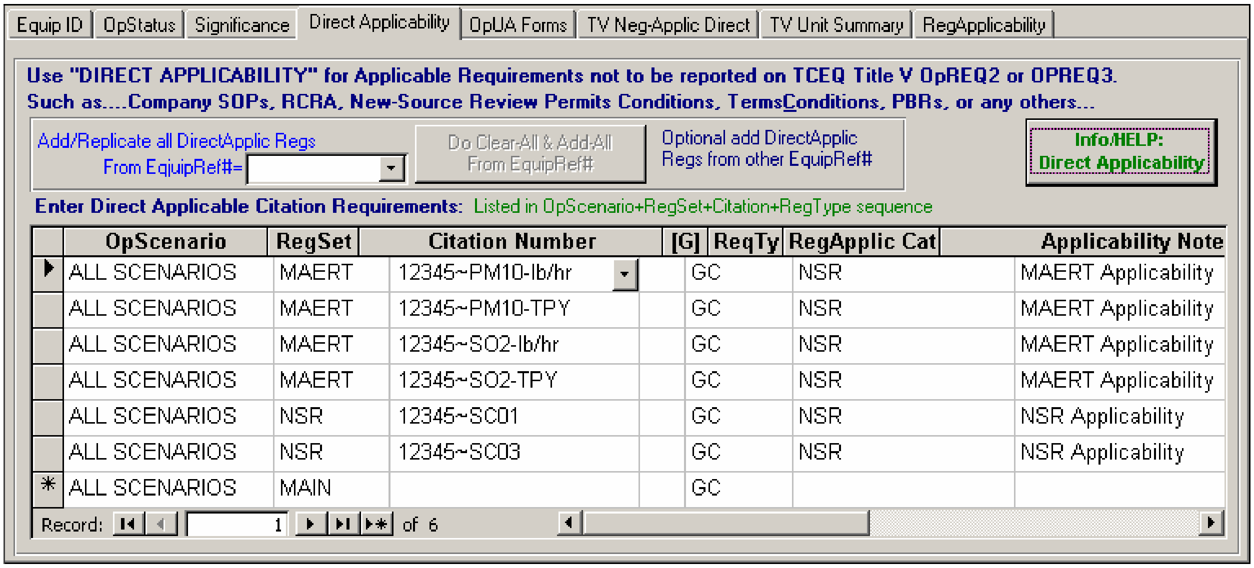
Significance Note: (Optional) If equipment item is deemed “Insignificant” you may wish to add additional information here to better document the classification. Or you may add notes documenting the decision that the equipment is "significant".

Applicability Note: Note if equipment will be reported on multiple UA form-groups such as Flare and Boiler OP-UA forms.

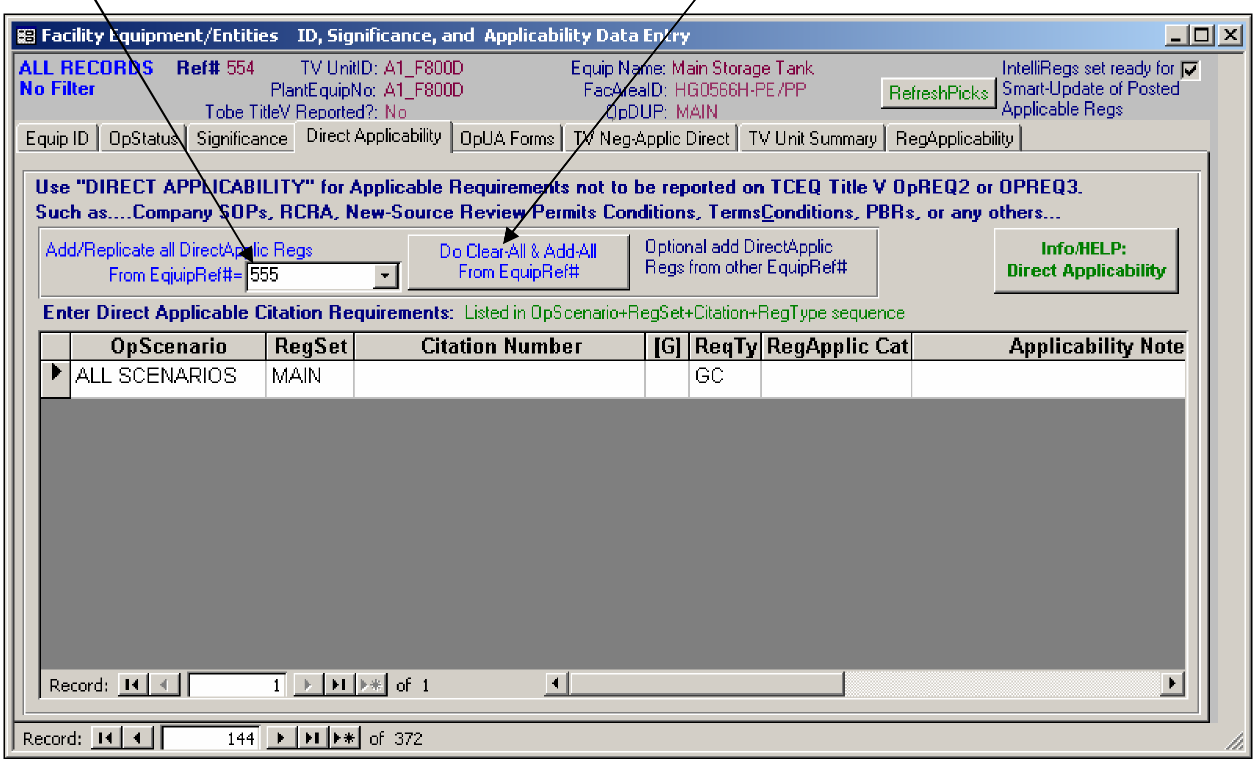
Equipment/Unit UserNote: Optionally provides equipment operation dates and specification data and comments.

D4. Direct Applicability

The *Direct Applicability* tab allows for data entry of equipment applicability in addition to the Op-Req3. This may include NSR permit conditions, MAERT limits, TV Terms & Conditions, referenced citations, etc. This also allows for different operating scenarios and citations to be grouped in sets such as Reg 5. The requirement type of GC applies all Task definition types such as ST, MN, RK, and RP without having to enter separate rows for each type.

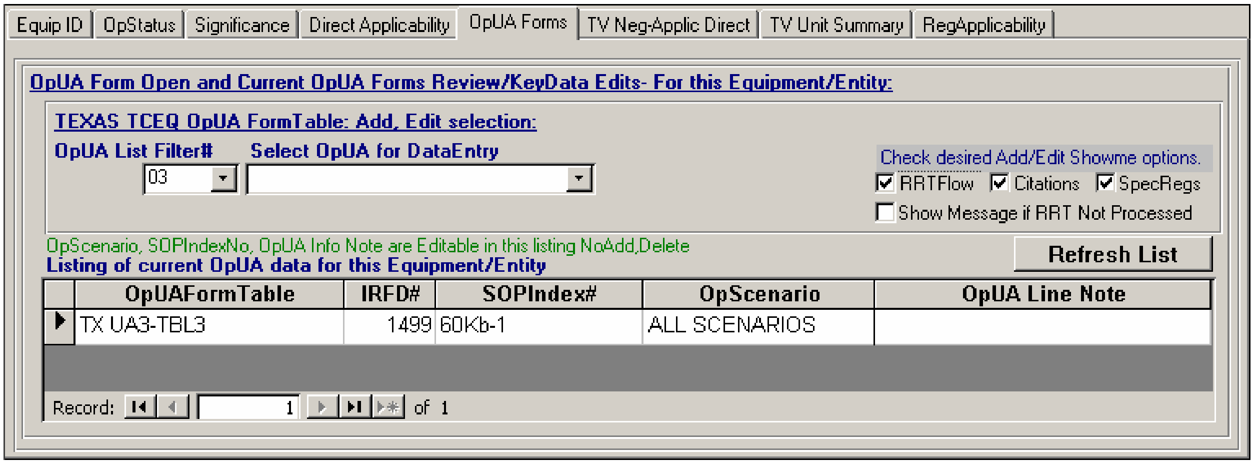


Direct Applicability may be copied from one piece of equipment to another by selecting the EquipRef# from the dropdown box and running the **Do Adds** button.



D5. OpUA Forms

Selection of the **OpUA Forms** tab on the ***Equipment/Entities ID, Significance, and Applicability Data Entry*** form enables selection of an OP-UA Form and then ADD/EDIT of data for the selected form.

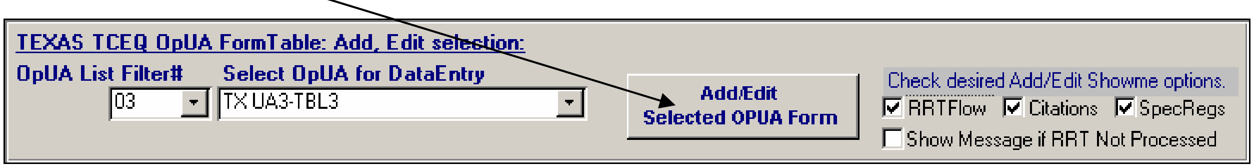


<u>OpUA Forms</u> tab: The TCEQ OP-UA FormTables that have been used for this piece of equipment are listed here. To open a form for data entry, first select the *OpUA List Filter #* for the desired equipment type. Click on the *Select OpUA For DataEntry* dropdown arrow button for the list of forms associated with that equipment type. The TCEQ OP-UA FormTable-Revisions appropriate for the Title V Equipment Type, i.e. 03=Tanks, 04=Loading, are offered for selection. Refer to TCEQ OP-UA Form Instructions to determine whether a form is appropriate for the equipment item. If you wish to enter data in another Equipment Type form, you must first change the *OpUA List Filter #* to be able to select different forms.

<u>OpUA List Filter #</u>: Internal for the IntelliRegs program. This value determines the list of OP-UA forms that will be offered in the **Select OpUA for DataEntry** operation. If the equipment item will use more than one OP-UA form type, then this value must be reset prior to selecting the **Select OpUA for DataEntry** dropdown to have the desired UA forms displayed. For example, if an equipment item must report using OP-UA 3, and also report using OP-UA 7, then enter 03 to select UA3 forms, then later enter 07 to select from UA7 forms.

> **Note**: Changing this class code has no effect on existing=already entered OP-UA data or on the printing of OP-UA data for the equipment/facility.

After selecting the OP-UA form from the drop-down list, the **Add/Edit Selected OPUA Form** button is enabled.

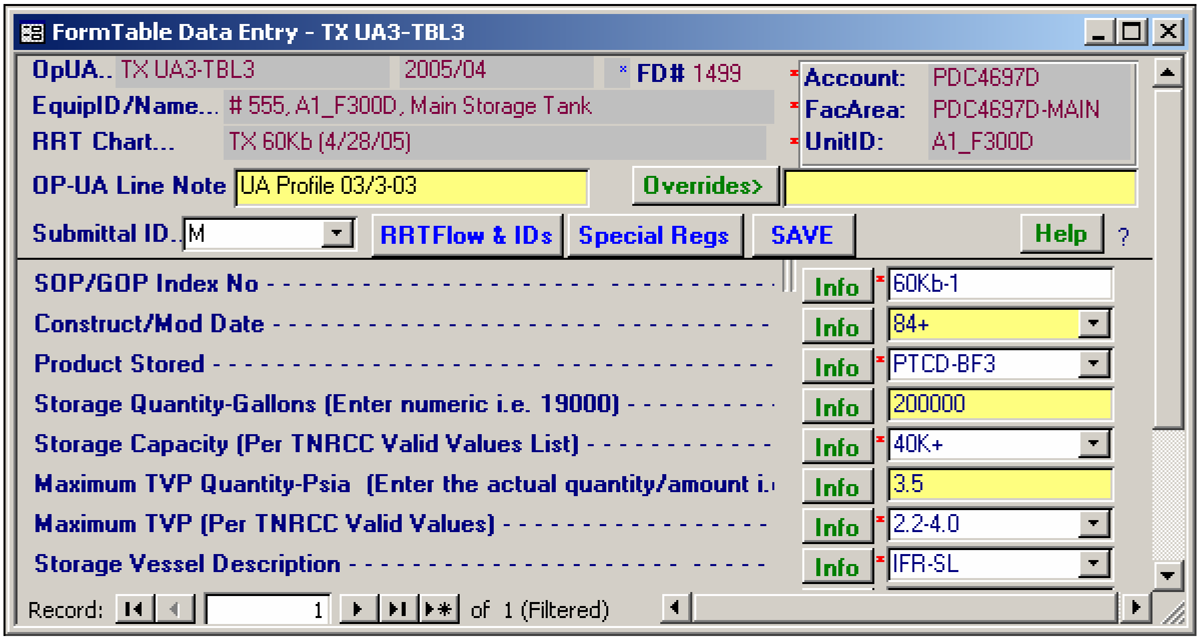


The *Add/Edit Showme options* checkboxes determine whether secondary “floating” windows will appear with your OP-UA form data entry upon open of the OP-UA form. (All secondary windows can be opened while using the OP-UA form. These checkboxes control whether the secondary windows are initially open when the OP-UA form is first accessed.) The *Show Message if RRT Not Processed* checkbox will display a message indicating that no RRT logic is available for the selected OP-UA form. Uncheck this box if you do not wish to see this message each time you open that form. After setting the checkboxes to the desired value, proceed to Add/Edit.

Click on the **Add/Edit Selected OPUA Form** command button to open the selected OP-UA form to begin OP-UA form data review, edit, and adds for this equipment item.

Form Data Entry

After selection of the **Add/Edit Selected OPUA Form** command button at the **Rules and Form Data** Tab of the ***Equipment*** data entry window, the designated OP-UA form is opened for data entry for the equipment item:



The top section of all OP-UA data entry forms contains the following controls and cells:

Display Only(Not Editable):

OP-UA Form: The Form and Table and Revision date of this, the selected OP-UA form

EquipID/Name: RefID#, PlantEquipID, Name

RRT Chart: TCEQ RRT Flowchart and Revision date matched/processed this OP-UA

Account, FacArea, UnitID: For the current equipment item

FD#: A unique number assigned to a OP-UA data row. Internal for IntelliRegs

Entry Cells: (Editable by user for each OP-UA data entry row)

OP-UA Line Note: (Optional) Any user info. For example, may contain actual values for documentation rather than the selected TCEQ values, i.e. "Const=1992, 222,000Gals Capacity", or information on OpUA profile designation. Field is longer than shown and will hold and report for 65 wide.

Overrides: (Optional) See separate instructions in this User's Manual on the use of this cell: **RRT Overrides** and/or select **Overrides** command button for info/instructions.

SubmittalID: (Optional) Select from drop-down list to designate OP-UA data row's submittal ID, i.e., 0= Original Title V Submittal, 1=Revision 1, M=Master OpUA datarow….

See **TV Submittal ID** for the add/edit of SubmittalIDs. See **Reports** for report selection criteria and Dataset creation based upon SubmittalID filter selections.

Command Buttons: (For supplemental=secondary floating windows data)

Overrides displays an information dialog box explaining use of RRT Override features.

RRTFlow&IDs: If the ***RRT Flow*** window for your OP-UA data entries is not displayed, (i.e., if the RRTFlow was not checked at selection of Add/Edit at the **Rules and Form Data** tab) selection of this command opens the floating, secondary ***RRT Decision Flow*** status window.

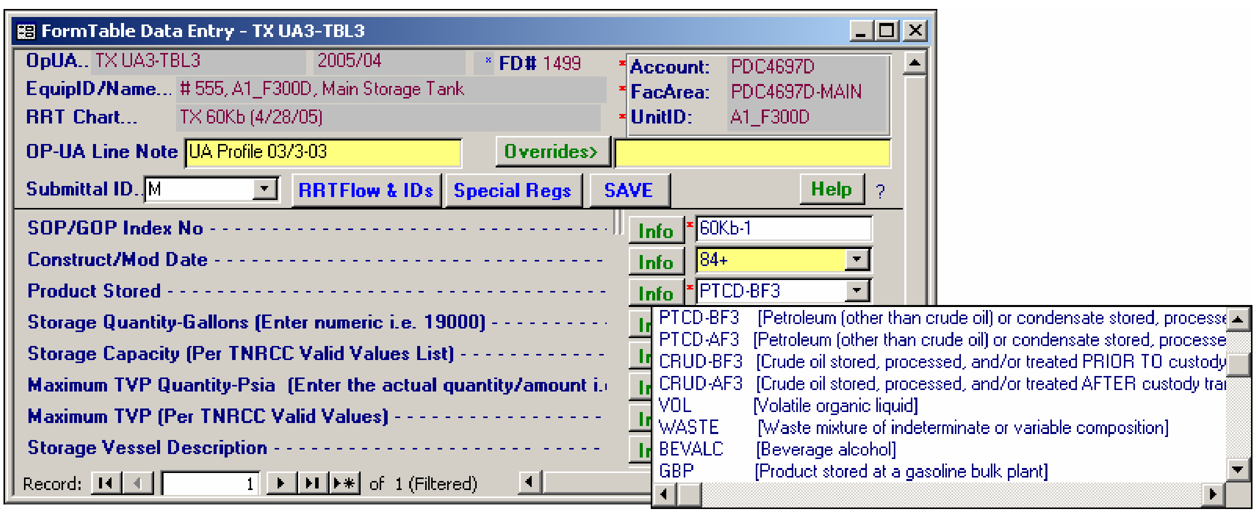
Special Regs: If the ***Special Regs*** window for your OP-UA data entry is not displayed, selection of this command opens the floating, secondary ***Special Regs*** window.

Note: The ***RRT-Determined Citations*** window is opened explicitly, if not opened initially, from the ***RRTFlow&IDs*** window by selection of the **Show Citations** button on that screen.

SAVE: Allows data entry to be saved without having to move off of the record.

Data below the header data is specialized for each OP-UA form-table revision. Current data for valid form attributes (columns), valid selection values, and RRT applicability flow logic is stored in the WizBase.mdb Knowledge Base.

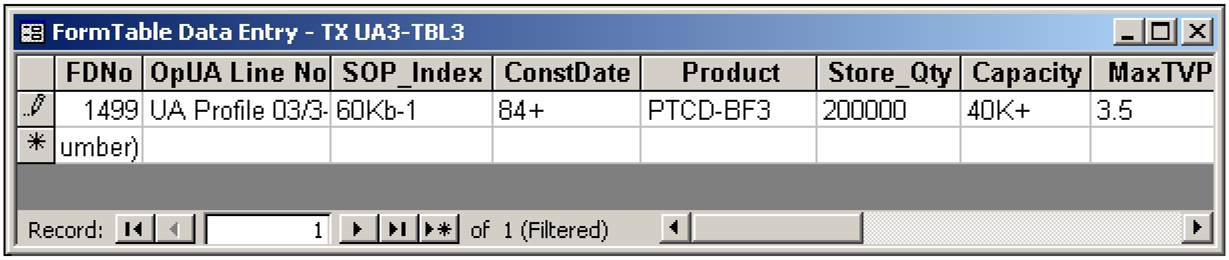
For the OP-UA form attribute data, enter data or select a value from the drop-down lists. Drop-down lists offer TCEQ valid values, but non-TCEQ values can be typed into a data cell if necessary.



If a non-TCEQ value is typed into a cell, a red **?** appears next to that cell, and the RRT processing will not continue.

The above screen shows data entry in the "Form" view. To enter data in a "Spreadsheet" format, select "*Datasheet View*" from the menu bar. See next page for an example screen.

The Datasheet View of Form Data Entry:


FormTable Data Entry - TX UA3-TBL3

	FDNo	OpUA Line No	SOP_Index	ConstDate	Product	Store_Qty	Capacity	MaxTVP
	1499	UA Profile 03/3-	60Kb-1	84+	PTCD-BF3	200000	40K+	3.5
*	umber)							

Record: 1 of 1 (Filtered)

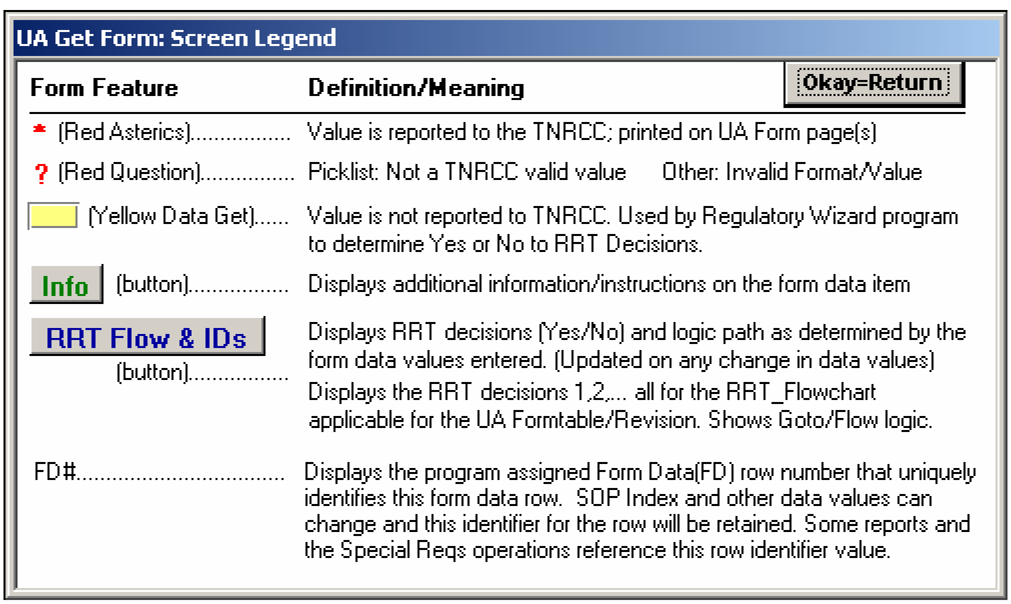
The Datasheet View, as shown above, may be used to enter or review Form Data Values. This format may be preferred by some because the data flows in rows similar to the appearance of the OP-UA form.

All selection validations and dropdown lists function in the Datasheet View identically as they function in the Form View form data entry screen.

You can switch between Datasheet and Form View to use the screen most appropriate for your operations.

<u>HELP Button at the FormTable Data Entry Screen</u>

Click the **HELP** button on the ***FormTable Data Entry*** screen for information explaining special features, indicators, and command buttons.


UA Get Form: Screen Legend

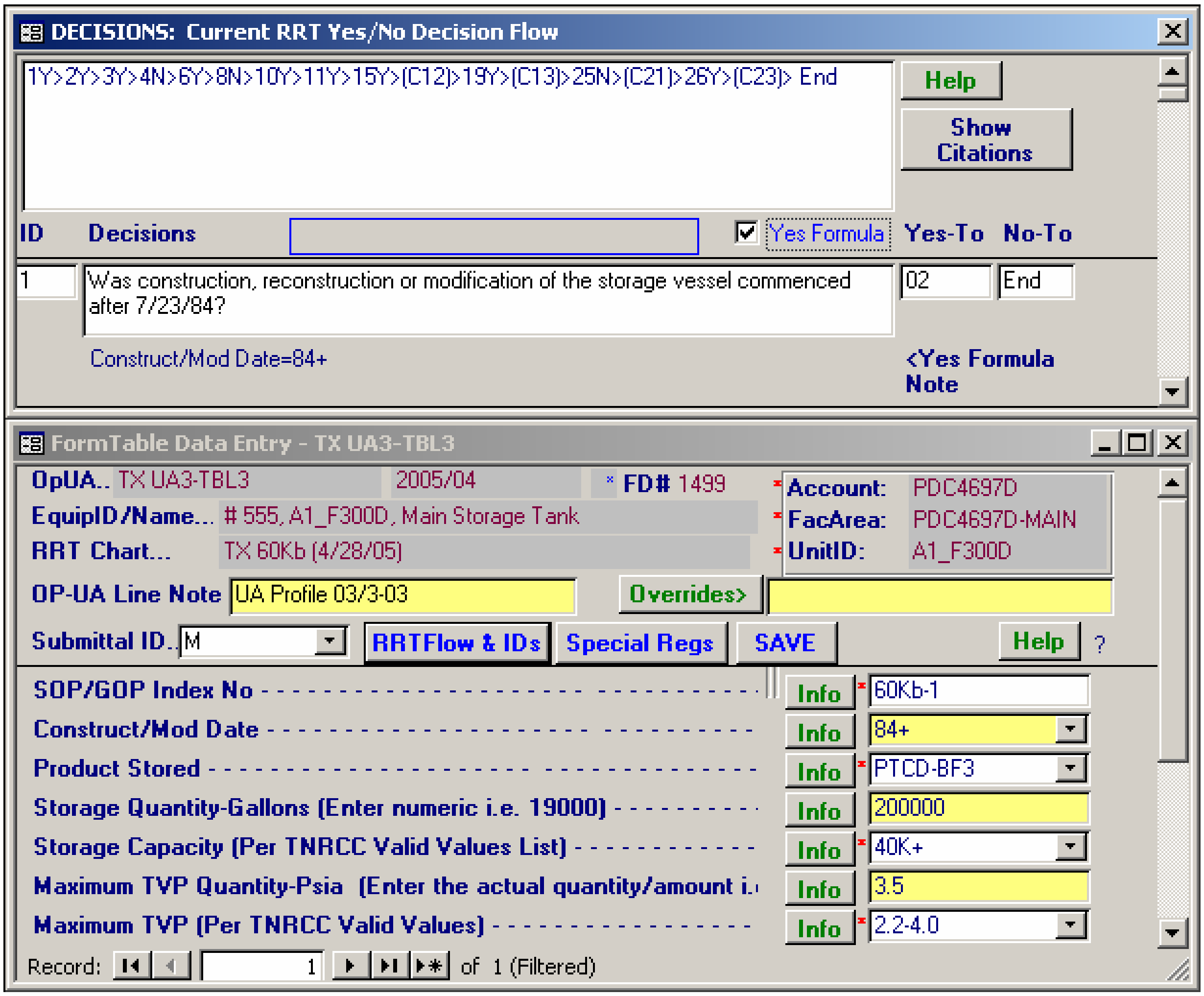
Okay=Return

Form Feature	Definition/Meaning
* (Red Asterics)................	Value is reported to the TNRCC; printed on UA Form page(s)
? (Red Question)...............	Picklist: Not a TNRCC valid value Other: Invalid Format/Value
(Yellow Data Get)......	Value is not reported to TNRCC. Used by Regulatory Wizard program to determine Yes or No to RRT Decisions.
Info (button)................	Displays additional information/instructions on the form data item
RRT Flow & IDs (button)................	Displays RRT decisions (Yes/No) and logic path as determined by the form data values entered. (Updated on any change in data values) Displays the RRT decisions 1,2,... all for the RRT_Flowchart applicable for the UA Formtable/Revision. Shows Goto/Flow logic.
FD#.................................	Displays the program assigned Form Data(FD) row number that uniquely identifies this form data row. SOP Index and other data values can change and this identifier for the row will be retained. Some reports and the Special Reqs operations reference this row identifier value.

RRT Decision and Compliance Block Status Based Upon Form Data Values

As each form data value is entered by the user, the program updates the resulting RRT decision flow and applicable citation blocks based upon the form data values.

When using the Form View for Form Data Entry, the RegsWizard program can provide interactive feedback on the decisions and compliance blocks of the RRT logic. To display the ***RRT Decision Path*** window, click on the **RRFlow & IDs** button.

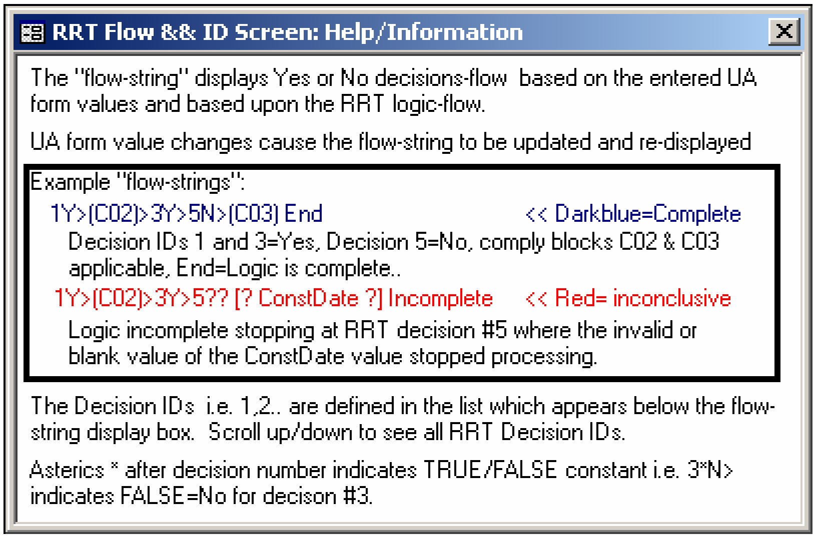


The above screen shows the ***RRT Flow*** window sized and placed above the ***FormTable Data Entry*** window. Some users prefer this positioning as the effects on the RRT Decision Path for any change in form data value can be seen immediately after any change is entered.

Click on the **HELP** button in the ***RRT Flow*** window to get the information as shown and discussed on the next page of this manual.

RRT Decision Flow and Applicable Citations Determination

The **HELP** button in the ***RRT Flow & IDs*** window presents the dialog window shown below, which explains the RRT Flow Path notation and color codes.



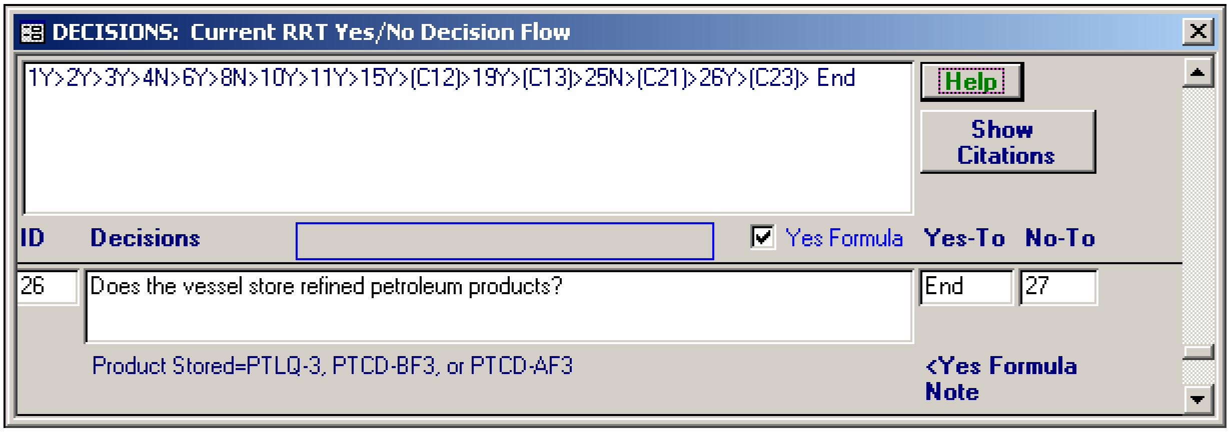
RRT decisions from the flow diagram are numbered 1,2,3… and the compliance blocks from the flow diagram are numbered C01, C02, etc.

Lets review the flow string shown in the ***HELP*** window: 1Y>(C02)>3Y>5N>(C03) End

This flow-string tells us that the form data entered causes the RRT logic flow as follows:
Decision#1 is Yes, which caused compliance block C02 to be applicable.
Flow continues to Decision#3.
Decision#3 is Yes.
Flow continues to Decision#5.
Decision#5 is No, which causes compliance block C03 to be applicable.
When Decision#5 is No, no further form data is required (=END).

IntelliReg's knowledge base stores the flow rules and the citations for each RRT diagram. Based upon the entered form data the program determines the YES or NO value for each decision in order as directed by the diagram flow. This flow is displayed in the RRT Flow-String.

If you want to examine a particular decision to see the question and the formula determining YES or NO, scroll to the decision number and select the Yes Formula checkbox as shown.



Notice in the example that the decision is YES for Decision #26 because the Product Stored is PTCD-BF3. Note also, that the Yes-To indicates that if Decision #26 is YES, then flow logic is completed=END. If Decision #26 would have been =NO, for Product Stored=PTLQ-3, PTCD-BF3, or PTCD-AF3, for example, then the flow would have branched to Decision #27.

The appearance of bracketed “compliance blocks”, like the (C12) and (C13) in the flow-string, indicates that the RRT Flow logic identifies applicable citations. Note that the numbers for the RRT Decisions, i.e. 01,02…29, and the RRT Compliance Blocks, i.e. C01, C02…, were assigned by PDC. These numbers can be matched to the TCEQ RRT flow diagram by reviewing the decision flow branching.

A compliance block, C01, C02 etc., may contain one or more citations. For example, the block below shows that three citations will be applicable when the compliance block C13 is in the flow-string.

RRT Compliance Block Citation Contents for Block ID=C13

ComplyBlock	ReqmtType	Citation
C13	Standard	60.112b(a)(1)(ii)(B)
C13	Monitor	[G]60.113b(a)(3)
C13	Report	60.115b(a)(4)

The window below shows an example of how the “flow” of decisions YES or NO are captured for an RRT Diagram.

RRT Decisions And Yes/ No GoTo Actions

ID	RRT_Decision_Yes_No	Yes_To	No_To
01	Construction after 7/23/84?	02	End
02	Storage of volatile organic liquids(VOL)?	03	End
03	Design Capacity >=40m3 (10,600)?	04	End
04	Storage vessel applicable to 60.110b(d)?	End	05
05	Design Capacity < 75m3 (19,800)?	End	06
06	Design Capacity >=1551 m3 (39,900)?	08	07
07	VOL max true vapor pressure < 15.0 kPa?	End	09
08	VOL max true vapor pressure < 3.5 kPa?	End	10
09	VOL max true vapor pressure >=27.6 kPa?	11	12
10	VOL max true vapor pressure >=5.2 kPa?	11	12

For a further review of RRT Diagrams, their representation in the program, and reading the flow-strings, please see the **RRT Logic** in the Slideshow section of this User’s Manual.

Also see the User’s Manual section on **RRT Overrides**, which explains the use and impacts on the RRT Flow logic using RRT Overrides options.

RRT Overrides

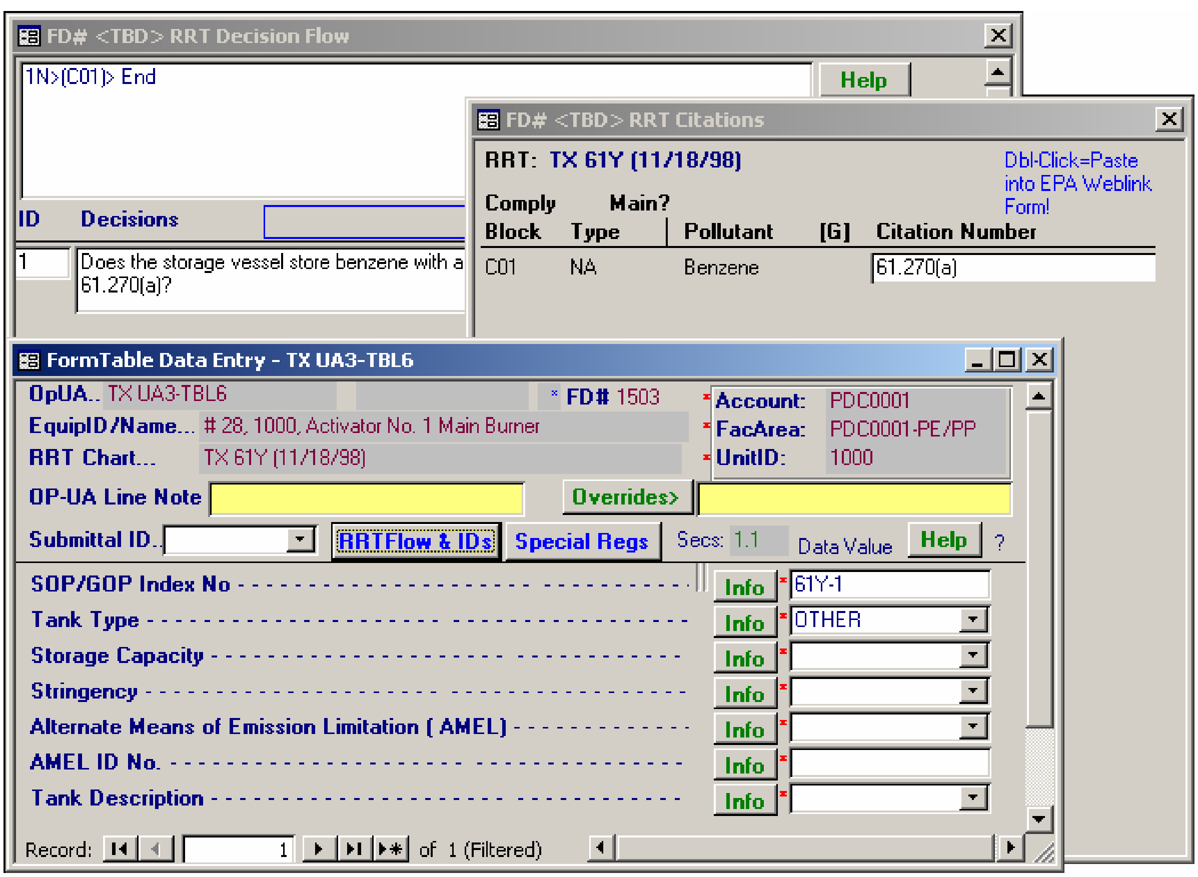
The TCEQ RRT diagrams enable citation applicability (or negative applicability) to be determined from the values of OP-UA attributes. IntelliRegs captures flow logic from the RRTs and processes applicability flow based upon entered OP-UA values. Extensive efforts have been made to see that formulas processing the OP-UA values for RRT decision-making are correct, however particular equipment or facility situations may require an RRT decision to be different than concluded by the standard formulas.

If you must revise the decision flow of a RRT from the Yes or No formula decision for your facility equipment item, this can be done using the RRT Overrides feature.

RRT flow is depicted in the ***RRT Flow*** window by a string of numbers followed by Y=Yes or N=No, indication of the citation blocks encountered. There is also a notation indicating whether the processing requires additional data values, or indicating END when a conclusion has been reached. RRT Overrides can change the “Yes” direction for a particular numbered RRT decision node, (i.e. decision #1, or #2) into a “No” or a “No” into “Yes” if needed.

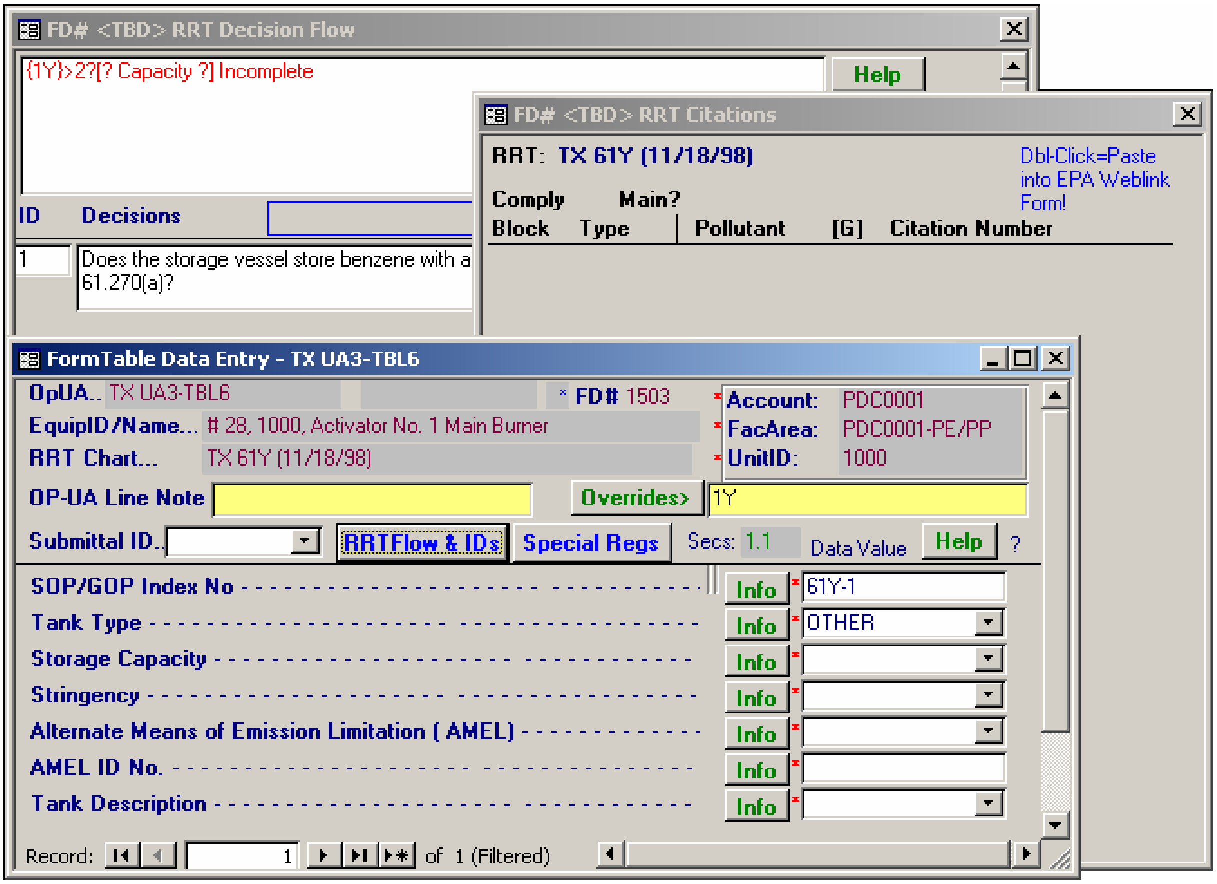
For example, in the RRT Flow string, 1Y>2Y>(C02)>End, an RRT Override of decision 2 from Y=Yes to No might revise the RRT Decision flow to 1Y>{2N}>(C03)>End. In the example, the curly braces around 2N indicate that the flow has been revised by an RRT Override.

In the example screen below, the user must RRT Override the 1N decision with a 1Y decision.

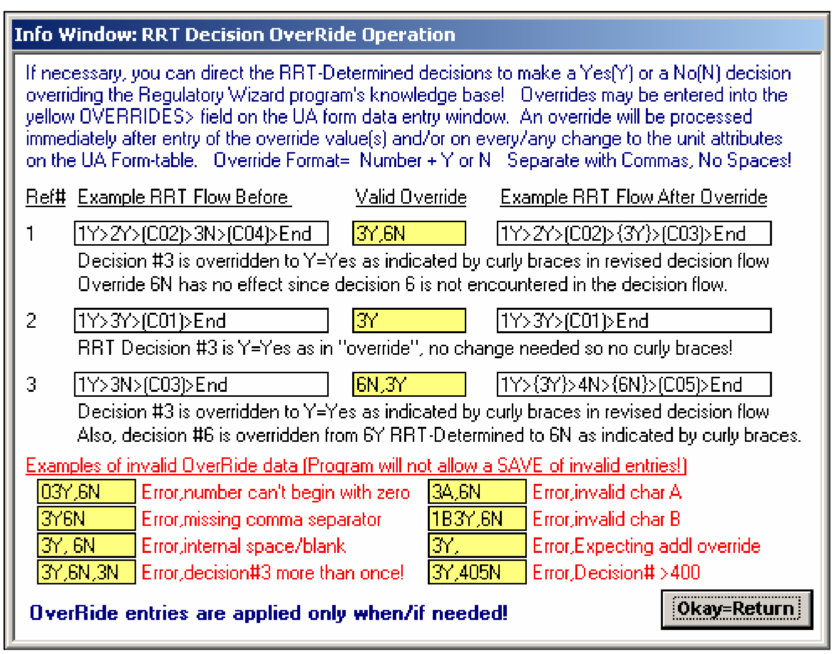


In order to do so, he will enter an RRT Override as shown in the following example screen.

In the example below, the user has enter 1Y into the RRT Override cell and pressed enter to implement the override. The changed RRT Decision Flow can be see with {1Y}.

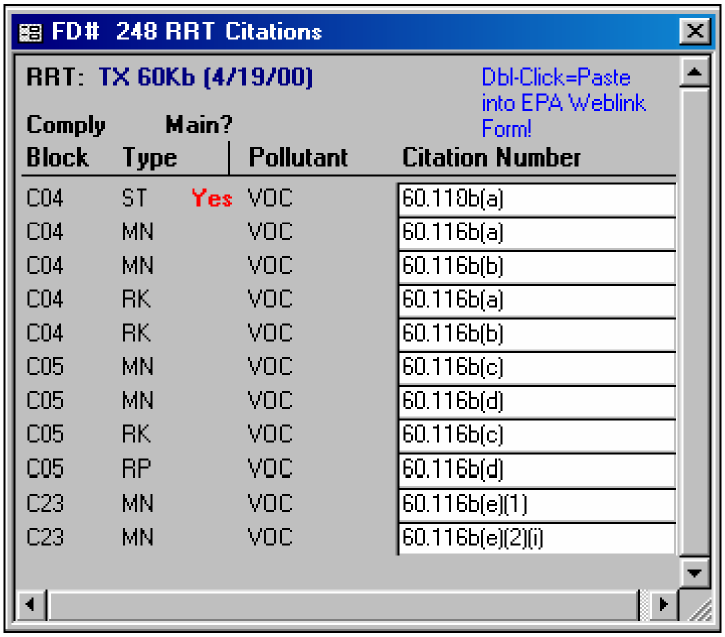


The **<Overrides>** command button on the ***OP-UA*** data entry screen provides online help info (example screen shown below) explaining the RRT Override process.



RRT Determined Citations

Optionally during OP-UA data entry, a floating window can be displayed that shows the current status of applicable (or negative applicable) citations based upon the OP-UA data values entered and RRT logic. The ***RRT Citations*** window appears in conjunction with the ***RRTFlow & ID*** window to display citations within citation blocks in the RRT Flow string. An example ***RRT Determined Citation*** window is shown below.



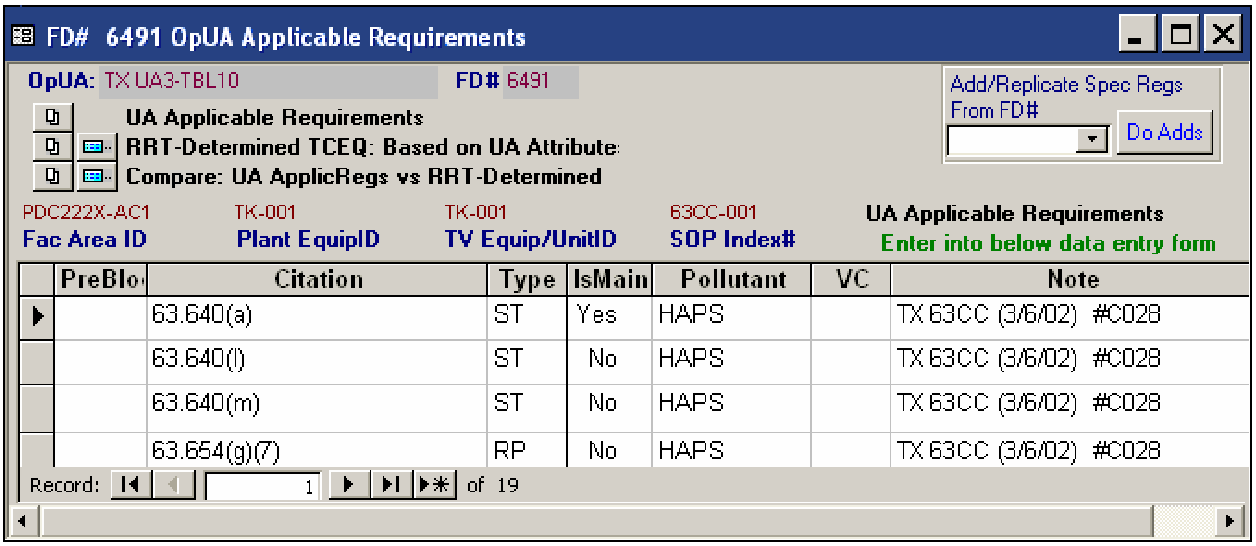
In the example above, RRT-Determined citations from blocks C04, C05, and a partial of C23 are shown. RRT-determined applicable requirements are for review. They do not influence the actual UA Applicable requirements.

> **Note**: The numbers assigned as identifiers for the RRT Flowchart citation blocks, i.e., C04, C05, and C23, are assigned by PDC and do not appear on the TCEQ RRT Flowchart. The identity of blocks can be rather easily determined by review of the RRT Flow logic (Report C1) and the printed flowchart.

Special Regs for Equipment OP-UA Data Entry

Special Regs are also referred to as OpUA Applicable Requirements. IntelliRegs reported applicability for an OpUA row is equal to the entered Special Regs independent from the RRT-Determined citations. Review reports and data lists are provided for the UA Applicable Requirements, RRT-Determined, and a comparison. Add, edit, delete Special Regs for an OP-UA row in the ***Special Regs=OpUA Applicable Requirements*** "floating" window available during OP-UA form use.

Entry of Special Regs is easily done, but care must be taken that the complete, correct values are entered for the applicability. An example Special Regs data entry window is shown below.


FD# 6491 OpUA Applicable Requirements

OpUA: TX UA3-TBL10 FD# 6491

Add/Replicate Spec Regs From FD# Do Adds

UA Applicable Requirements

RRT-Determined TCEQ: Based on UA Attribute

Compare: UA ApplicRegs vs RRT-Determined

PDC222X-AC1 Fac Area ID | TK-001 Plant EquipID | TK-001 TV Equip/UnitID | 63CC-001 SOP Index# | UA Applicable Requirements Enter into below data entry form

PreBlo	Citation	Type	IsMain	Pollutant	VC	Note
	63.640(a)	ST	Yes	HAPS		TX 63CC (3/6/02) #C028
	63.640(l)	ST	No	HAPS		TX 63CC (3/6/02) #C028
	63.640(m)	ST	No	HAPS		TX 63CC (3/6/02) #C028
	63.654(g)(7)	RP	No	HAPS		TX 63CC (3/6/02) #C028

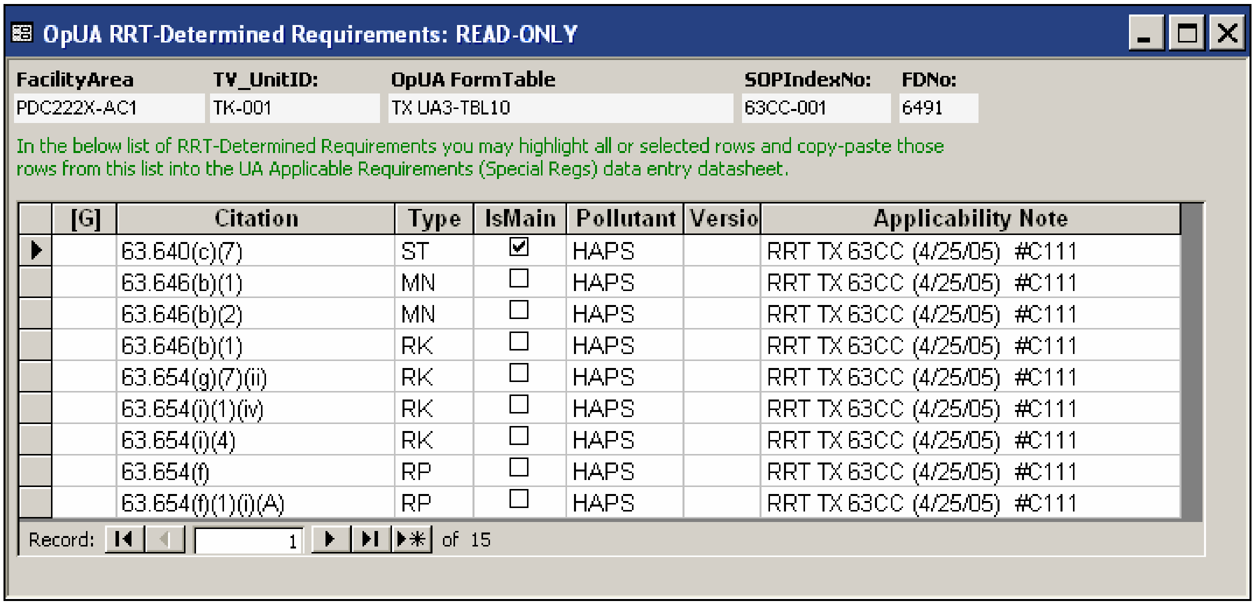
Record: 1 of 19

Optionally you can copy and paste some or all rows from the RRT-Determined applicability into your Special Requirements: OpUA Applicable Requirements form.

To copy-paste RRT-Determined applicable requirements select the RRT-Determined TCEQ: Based on UA Attributes data listing button to open the OpUA RRT-Determined Requirements: READ ONLY form. (See Figure in this Section.) Highlight entire row(s), select copy (or Ctrl-C), then return to the OpUA Applicable Requirements form listing/datasheet and paste (Ctrl-V) those copied rows into that listing. All rows in the OpUA Applicable Requirements data will report as Applicable in the TCEQ OpREQ3 or will report as Negative Applicable (Permit Shield) in the TCEQ OpREQ2 data. Do not enter any informational rows that you do not want the Citation+Type+Pollutant to be in the Title V applicability.

> Note: In IntelliRegs versions prior to 7B the reported OpUA Applicable Requirements were based on a merged RRT-Determined +- Special Regs = NET Applicable Requirements. For version 7B and later this is no longer the case. OpUA Applicable Requirements are exactly as in the OpUA Applicable Requirements=Special Regs data without any influence from the RRT-determined applicability.

The RRT-Determined TCEQ: Based on UA Attribute data listing form:



OpUA RRT-Determined Requirements: READ-ONLY

FacilityArea	TV_UnitID:	OpUA FormTable	SOPIndexNo:	FDNo:
PDC222X-AC1	TK-001	TX UA3-TBL10	63CC-001	6491

In the below list of RRT-Determined Requirements you may highlight all or selected rows and copy-paste those rows from this list into the UA Applicable Requirements (Special Regs) data entry datasheet.

[G]	Citation	Type	IsMain	Pollutant	Versio	Applicability Note
	63.640(c)(7)	ST	☑	HAPS		RRT TX 63CC (4/25/05) #C111
	63.646(b)(1)	MN	☐	HAPS		RRT TX 63CC (4/25/05) #C111
	63.646(b)(2)	MN	☐	HAPS		RRT TX 63CC (4/25/05) #C111
	63.646(b)(1)	RK	☐	HAPS		RRT TX 63CC (4/25/05) #C111
	63.654(g)(7)(ii)	RK	☐	HAPS		RRT TX 63CC (4/25/05) #C111
	63.654(i)(1)(iv)	RK	☐	HAPS		RRT TX 63CC (4/25/05) #C111
	63.654(i)(4)	RK	☐	HAPS		RRT TX 63CC (4/25/05) #C111
	63.654(f)	RP	☐	HAPS		RRT TX 63CC (4/25/05) #C111
	63.654(f)(1)(i)(A)	RP	☐	HAPS		RRT TX 63CC (4/25/05) #C111

Record: 1 of 15

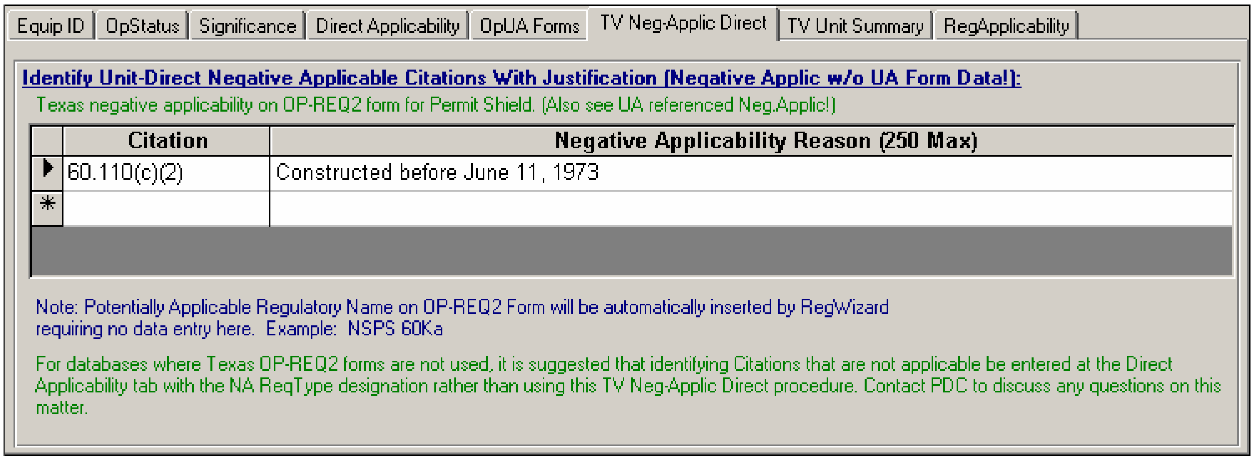
You can copy and paste all or selected rows from the OpUA RRT-Determined Requirements list into your OpUA Applicable Requirements=Special Regs data entry form.

> Note that a unique value index for the Special Regs=OpUA Applicable Requirements table will not allow duplicates of the unique value to be added. If you attempt to add duplicate key index values you will be notified of all duplicate values that were not added during your paste/insert request.

D6. OP-REQ2: TV Neg-Applic Direct

If negative applicability for OP-REQ2 is to be entered without reference to OP-UA data, then the OP-REQ2 form will print “OP-REQ2” rather than referencing the OP-UA form. Entries of Equipment-Direct Negative Applicability are made at the **TV Neg-Applic Direct** Tab of Equipment Data Entry.

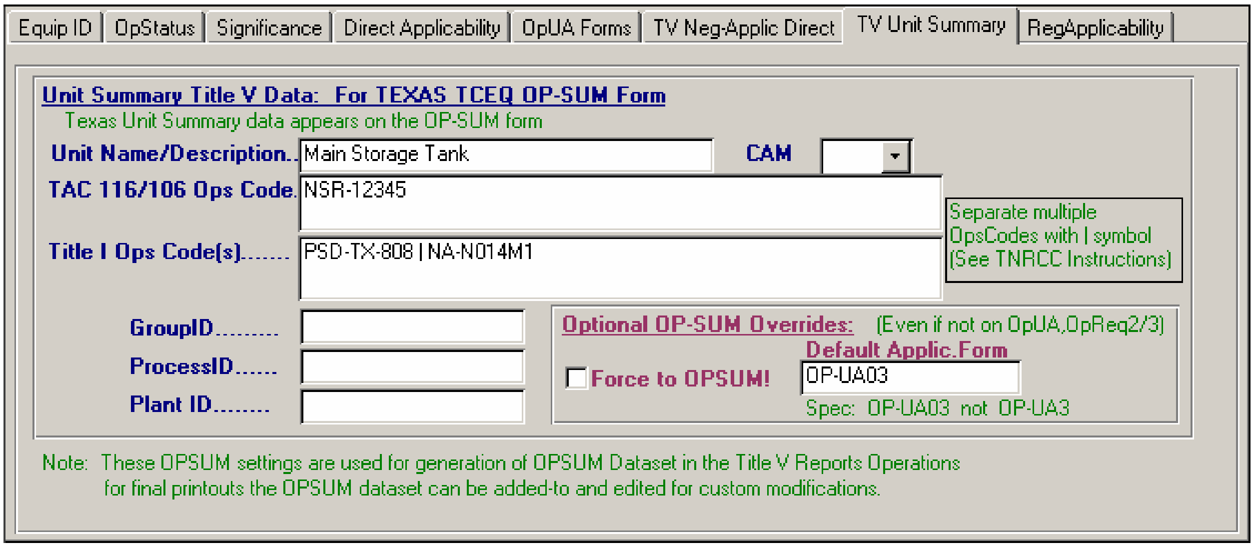
An example tab group data entry screen is shown below.



D7. TV Unit Summary

Additional UnitID values that are submitted in the TCEQ OPSUM form and will appear in the Title V Permit- Unit Summary section are entered at the TV Unit Summary tab. If OP-SUM records are created for a dataset (See **TV Reports: Title V DataSets**), then default values are set based upon the values stored in the equipment TV Unit Summary default values data cells.

Equipment OP-SUM default values are entered at the **TV Unit Summary** Tab of equipment data entry. An example tab group for data entry is shown below:



<u>*Unit Name/Description*</u>: Automatically filled in by program equal to Equipment Name on Equip ID tab.

<u>*CAM*</u>: Indicate if the unit is subject to CAM by selecting "Y". If not, leave blank.

<u>*TAC 116/106 Ops Code*</u>: Enter 30 TAC Chapter 116/106 preconstruction authorization under which the unit is operating. Examples: GF-, NSR-, or Standard Exemption or Permit By Rule.

<u>*Title 1 Ops Code(s)*</u>: Enter Title I preconstruction authorization (PSD and nonattainment permits) for which the unit is operating. Examples: PSD-TX-, or NA-.

<u>*GroupID*</u>: (Optional) Enter the unique ID No. for the group (for purposes of completing the unit attribute and applicable requirement forms) in the appropriate format. Example: GRP

<u>*ProcessID*</u>: (Optional) Enter the unique ID No. for the process group (for purposes of completing the unit attribute and applicable requirement forms) in the appropriate format. Example: PRO

<u>*Plant ID*</u>: (Optional) Enter the unique ID No. for the plant (for purposes of completing the unit attribute and applicable requirement forms) in the appropriate format. Example: PLT

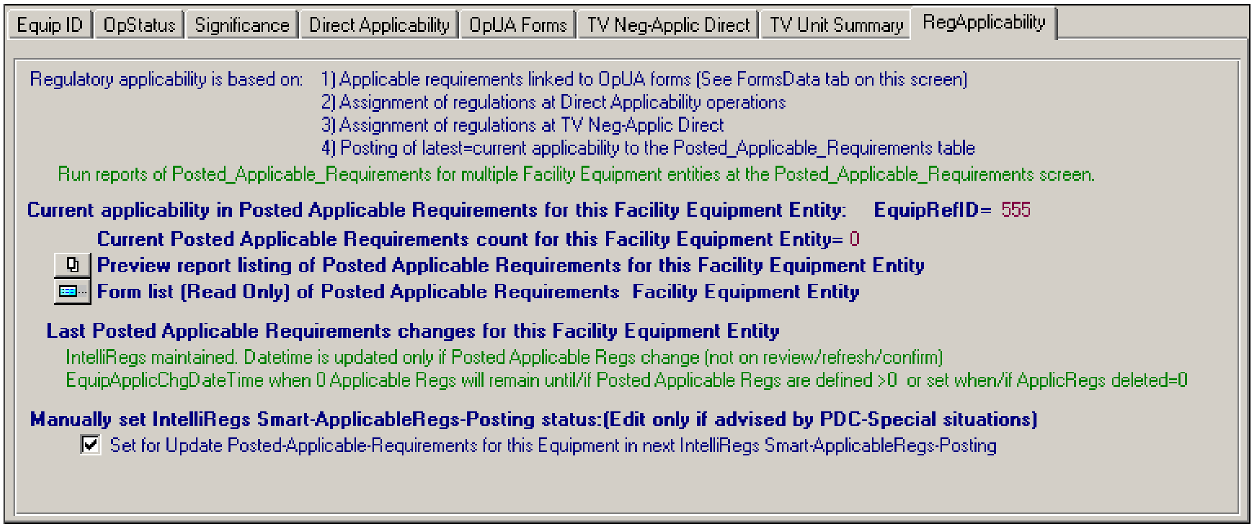
Force to OPSUM!: Enter any values you wish to be placed into the OP-SUM data by default for the Unit.

> **Note**: The actual dataset values can be edited (See **TV Reports: DataSet Edits: OP-SUM**) if these default values are not correct for the actual OP-SUM form row.

IntelliRegs requires data to be entered meeting TCEQ specifications. Validation warnings will be displayed if any entered value fails to pass validation checks.

D8. RegApplicability

You can review a report or form of the regulatory applicability for the Facility Equipment item by selecting buttons at the RegApplicability tab. The benefit of the report of form is that no other Facility Equipment is included so focus can be devoted to that individual equipment.

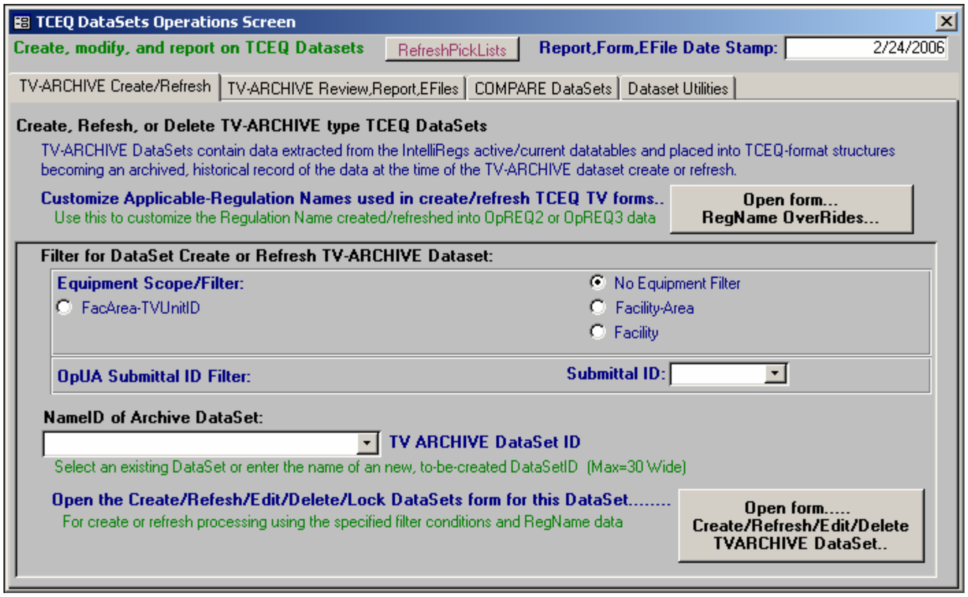


On Manually Set for Update Posted-Applicable-Requirements update:

Check this to have the Posted-Applicable-Requirements form update/refresh Unit + Applicable-Requirements for this UnitID. IntelliRegs automatically sets this=checked when Direct Applicability, TV Neg-Applic Direct, or OpUA form edits are performed. Optionally you may check or uncheck this setting as/if required.

D9. Title V Datasets

TEXAS-Permit-RegOps, TCEQ Dataset Ops are run from the tab-screen, which appears after selection of the **TV-ARCHIVE Create/Refresh** Tab.

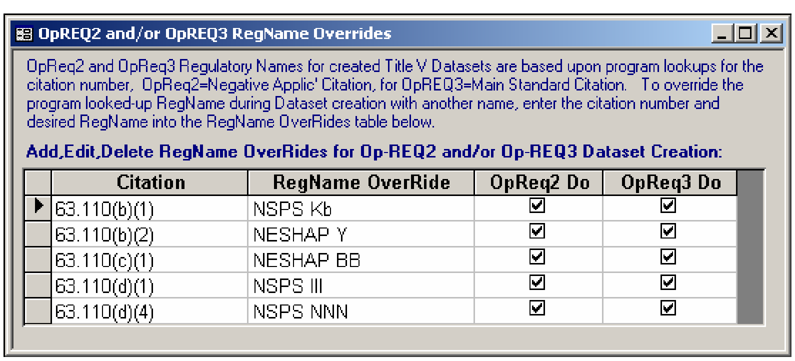


DataSet operations differ from those of the *Equipment and Attributes* tab as a sequence is required:

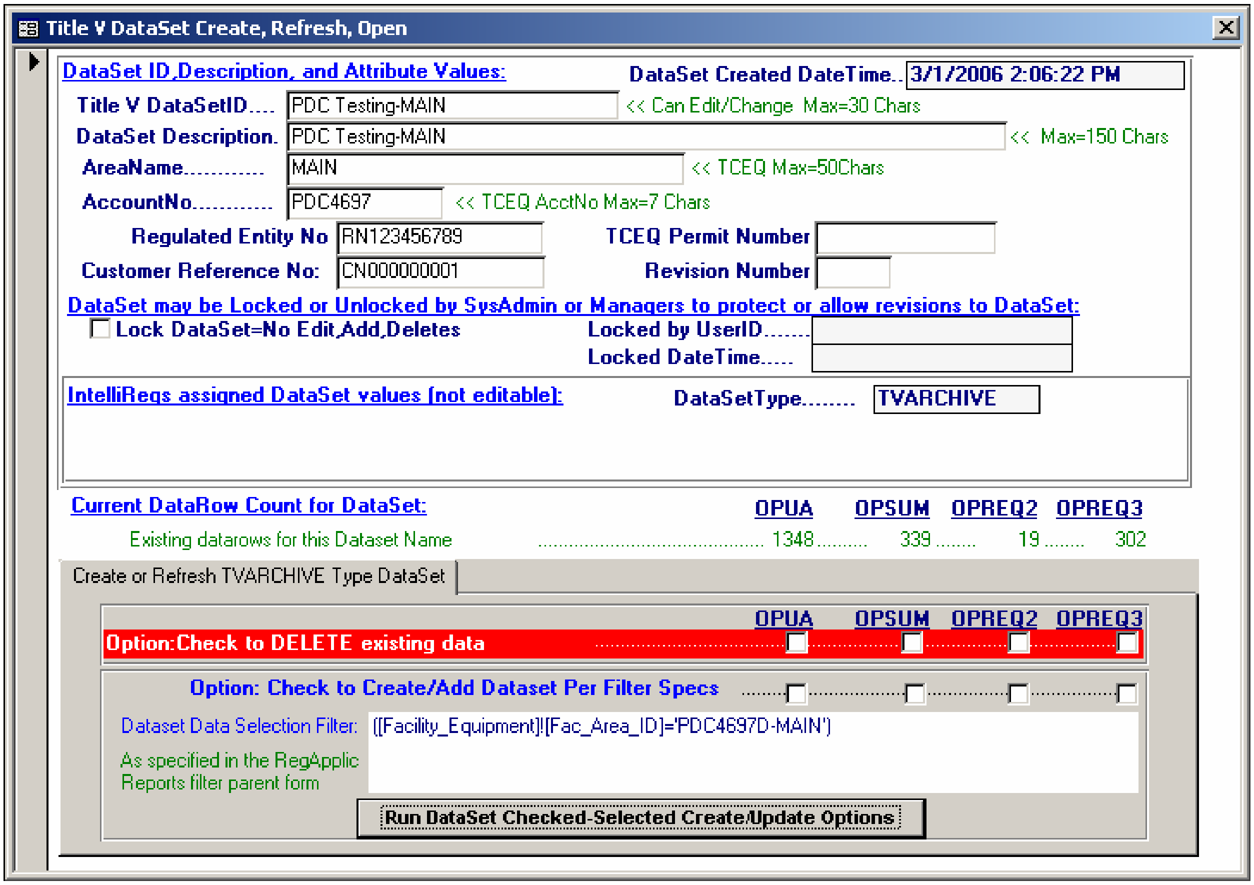
1.) Create a "Dataset" from TV data… Select the **CREATE/…** button
2.) Review/Edit the Dataset Source Data… Select …/**Refresh/Edit/Delete…** button
3.) Print Forms based on the Dataset data… Check "*Forms PrintOut*" checkboxes, then **RUN**
4.) Create the EFile for TCEQ Submittal… Check the "*Create EFile*" checkboxes, designate filename, then **RUN** (Optionally, also print the EFile contents simultaneous to creation)
5.) Copy Dataset… Select **Copy DataSet** button
6.) Compare DataSets… Select **Compare DataSets** button

RegName OverRides

OpReq2 and OpReq3 Regulatory Names f or created TV DataSets are determined from a program lookup for the citation number from Federal and State guidelines. To override the program looked-up RegName during Dataset creation with another name, enter the citation number and desired RegName into the RegName Overrides table shown below:



After entering a new "DataSet" name, or selecting an existing DataSet from the drop-down list, select the Create/Refresh DataSet Ops… button to open the Create, Refresh, Open DataSet Ops window shown below:



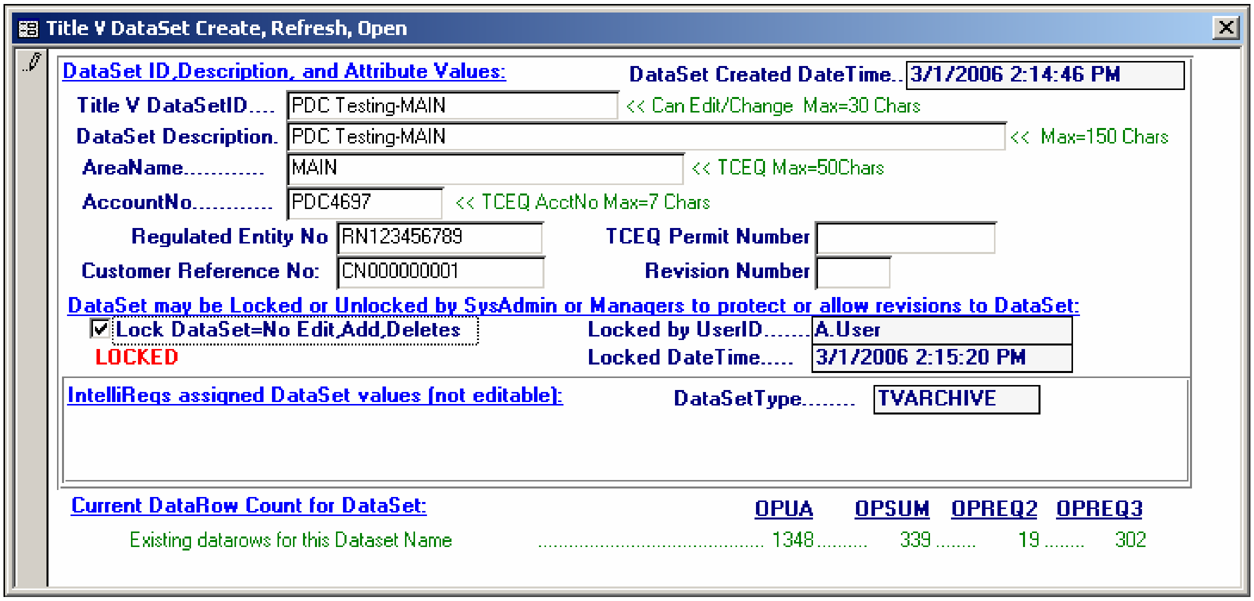
To delete records, check the **Delete** checkbox(s).

To add records, check the **Create/Add Dataset** checkbox(s).

Select the **RUN** button to run your selections. (Note that your designated filter is shown on this screen)

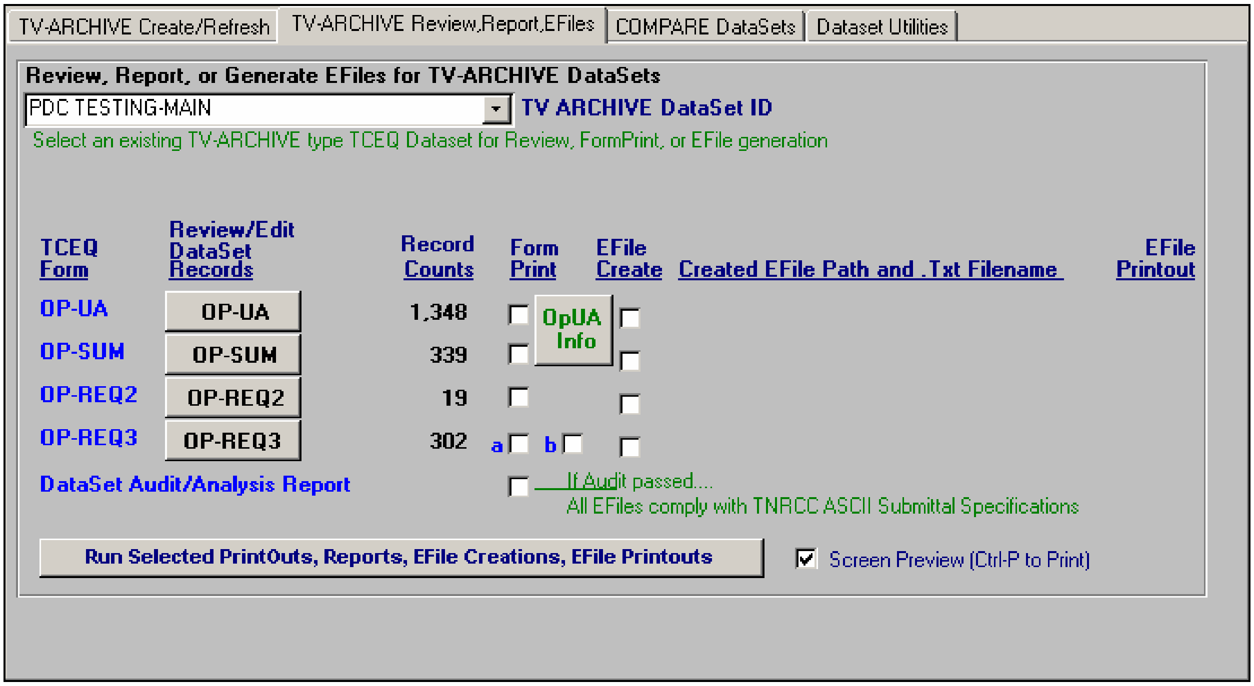
Locking a DataSet

Only the Manager or Administrator security levels can “lock” or “unlock” a DataSet. This creates a “Polaroid picture” of the data that cannot be edited or deleted. When this feature is used, the program records the name of the person who locked the DataSet and the date and time it was locked.



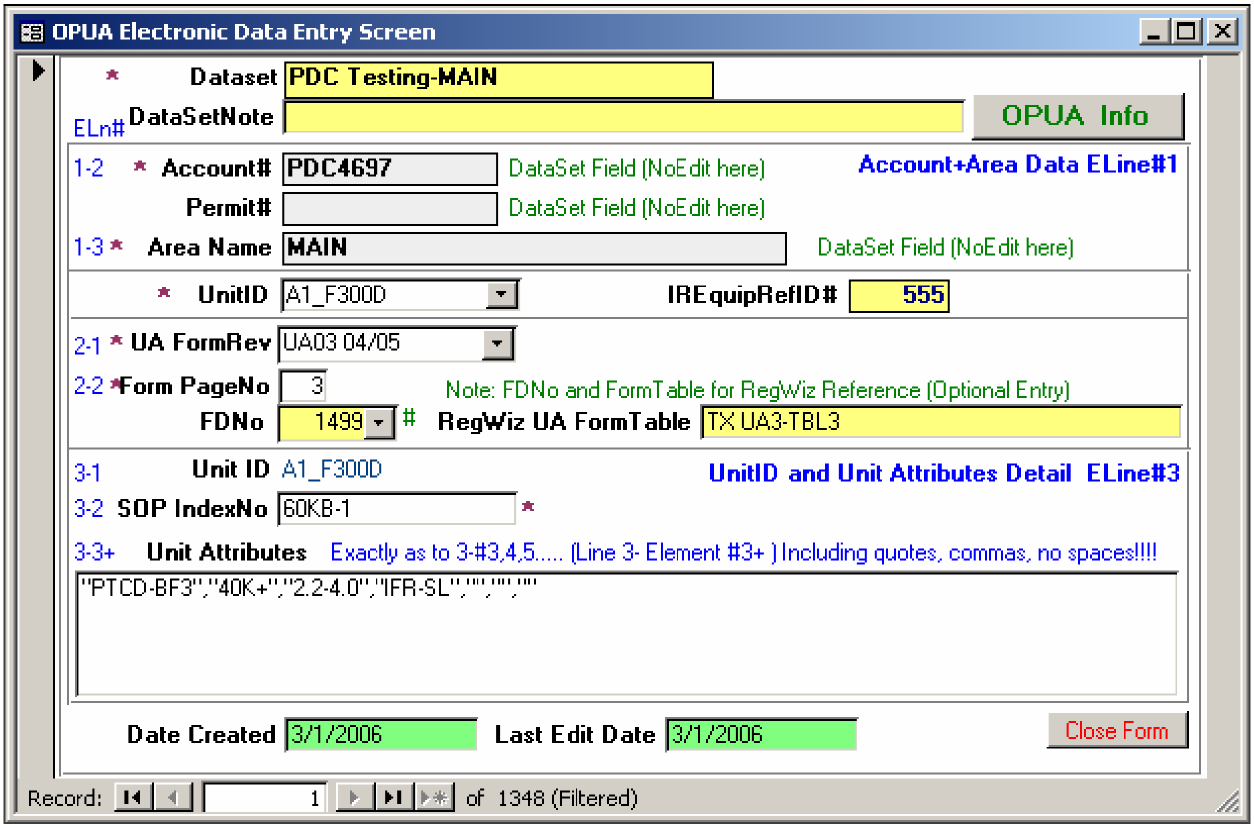
TV-ARCHIVE Review,Report,EFiles

Review Title V Archive DataSets for OP-UA, OP-SUM, OP-REQ2, and OP-REQ3 by checking the appropriate checkbox in the Form Print column and selecting the **Run Selected PrintOuts**… button.



You may also review and/or edit the Dataset records directly by selecting the **Review/Edit DataSet Records** button.

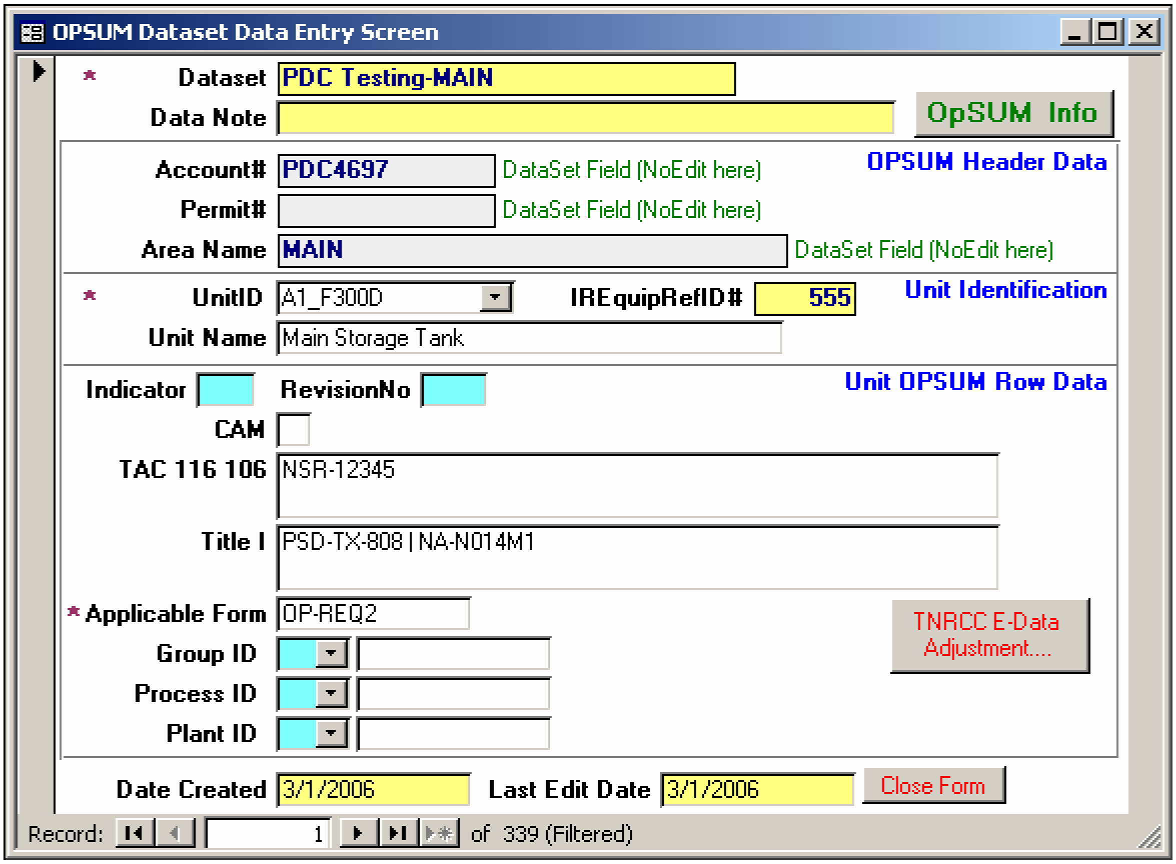
OP-UA Pre EFile DataSet – Data Review, Edit, and Add New Operations



Creation of an OP-UA dataset using the ***TV-ARCHIVE Create/Refresh*** screen will make data rows for each OP-UA data row in IntelliRegs which meets the user-designated dataset filter conditions, (i.e. FacArea=,SubmittalID=,…). Following the automatic generation, add OP-UA form data not in IntelliRegs, (i.e. Fugitive UA 12 data) and also add "Sitewide" records.

After making edits and additions to the OP-UA E-Source dataset on the **TV-ARCHIVE Review,Report,Efiles** tab, print the OP-UA EData report and create the EFile submittal file. Printing of the OP-UA Forms is done with the B1 report selection.

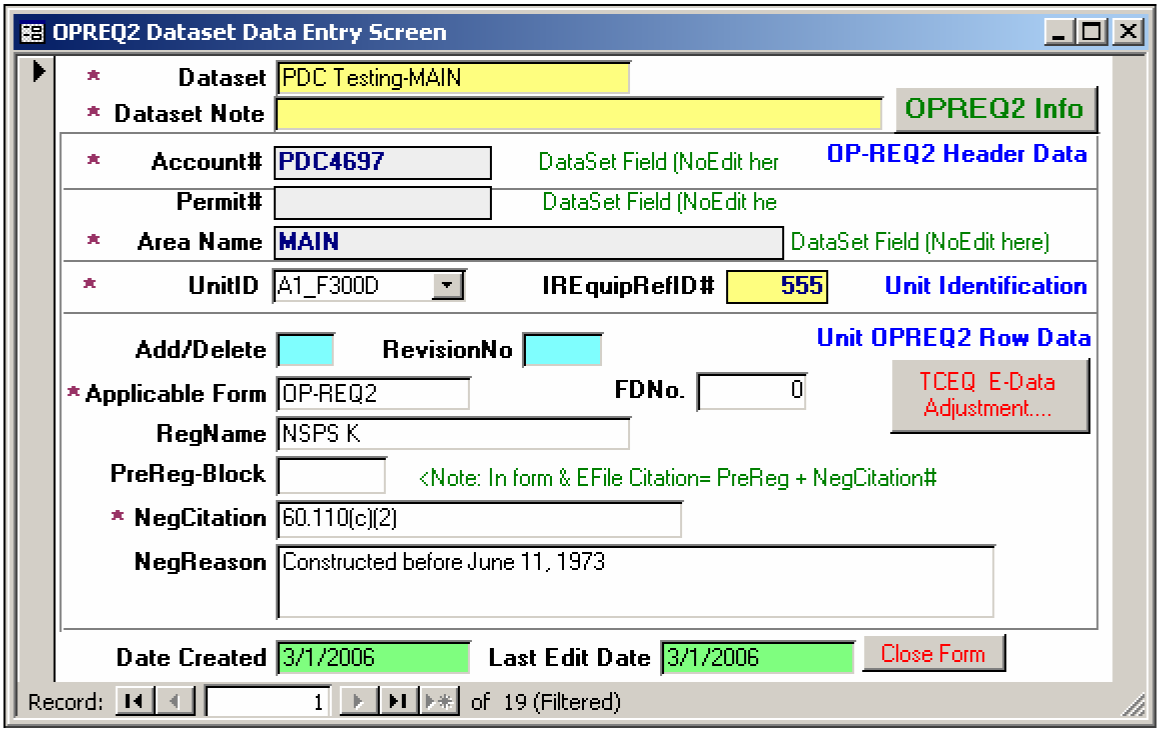
OP-SUM DataSet – Data Review, Edit, and Add New Operations



Creation of an OP-SUM dataset adds data rows for each Equipment-OP-UA data row which meets the user-designated dataset filter conditions, (i.e. FacArea=,SubmittalID=,…). Following the automatic generation from the ***TV-ARCHIVE Create/Refresh*** screen, you can edit TAC 116/106 and Title I data and Group, Process, Plant ID values as required. You will also want to add records for any OP-UA form data not in IntelliRegs, (i.e. Fugitive UA 12 data) and also add "Sitewide" records.

After making edits and additions to the OP-SUM dataset on the the **TV-ARCHIVE Review,Report,Efiles** tab, print the OP-SUM form and create the EFile submittal file.

OP-REQ2 Pre EFile DataSet – Data Review, Edit, and Add New Operations

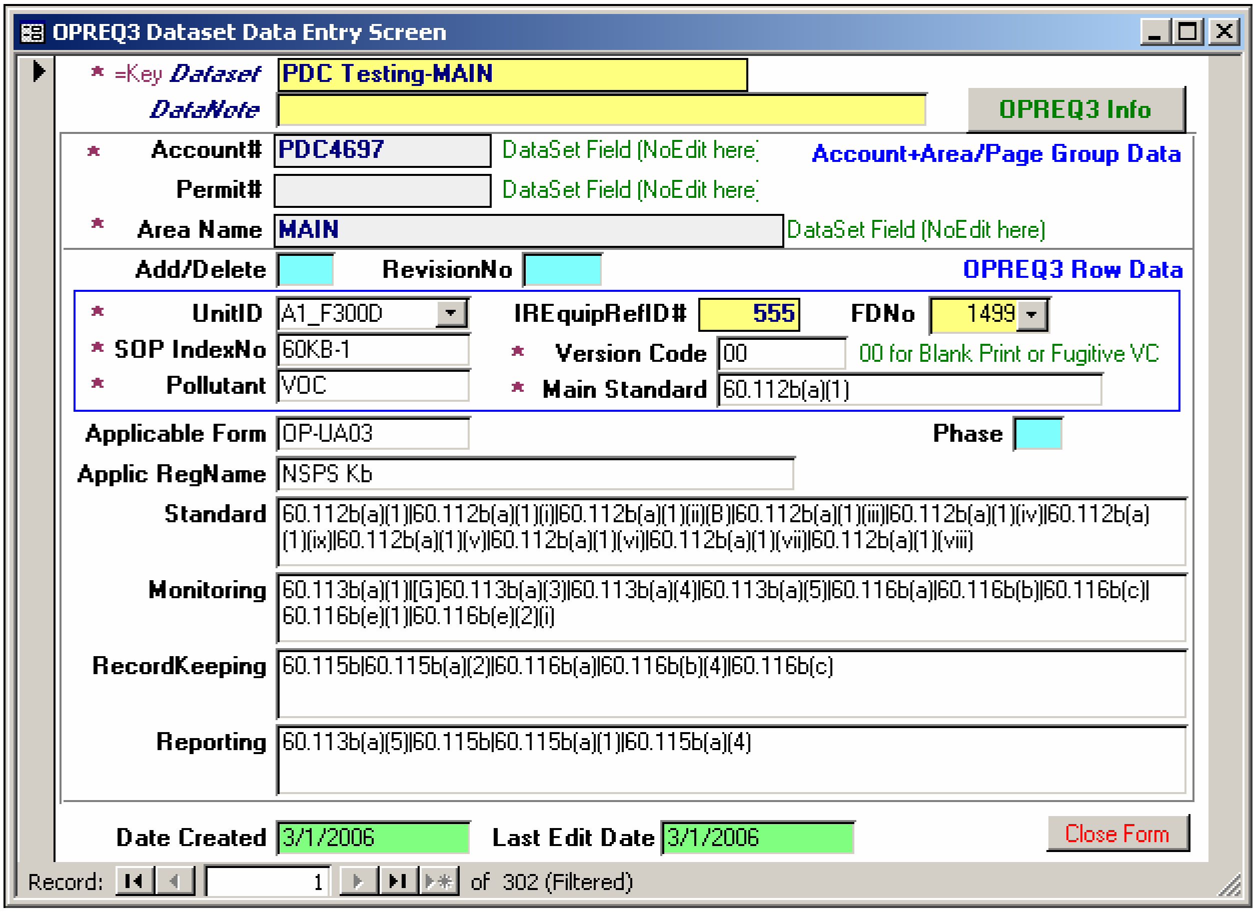


Creation of an OP-REQ2 dataset generates records for Equipment Negative-Applicability=OP-REQ2 data for the user-designated dataset filter conditions, (i.e. FacArea=xxx etc.). Following the creation of the OP-REQ2 dataset records you can review and edit that data at the OP-REQ2 Edit screen.

Use caution in making OP-REQ2 Archive dataset edits, adds, or deletes. For Archive datasets of current Title V data it is suggested that the actual IntelliRegs data be edited and the OPREQ2 Archive dataset refreshed rather than making changes directly into the OPREQ2 dataset.

After making edits and additions to the OP-REQ2 dataset on the the **TV-ARCHIVE Review,Report,Efiles** tab, print the OP-REQ2 form and create the EFile submittal file.

OP-REQ3 DataSet – Data Review, Edit, and Add New Operations



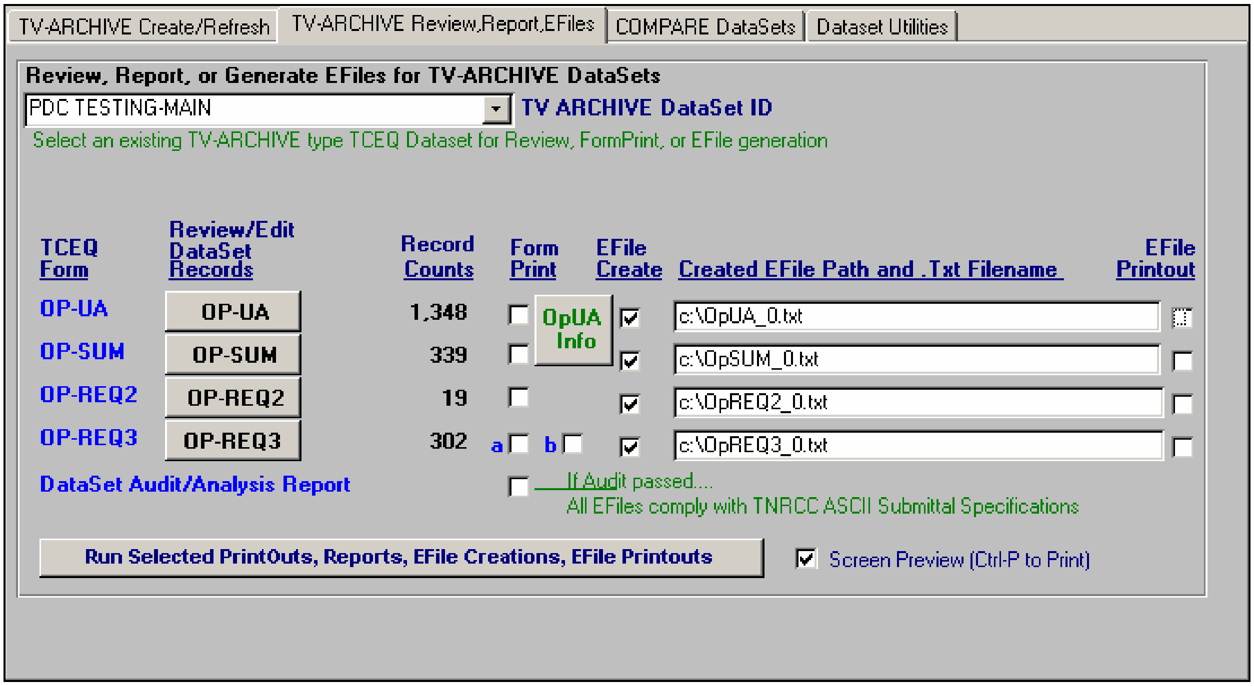
Creation of an OP-REQ3 dataset generates records for Equipment Negative-Applicability=OP-REQ2 data for the user-designated dataset filter conditions, (i.e. FacArea=xxx etc.). Following the creation of the OP-REQ3 dataset records you can review and edit that data at the OP-REQ3 Edit screen.

Use caution in making OP-REQ3 Archive dataset edits, adds, or deletes. For Archive datasets of current Title V data it is suggested that the actual IntelliRegs data be edited and the OPREQ3 Archive dataset refreshed rather than making changes directly into the OPREQ3 dataset.

After making edits and additions to the OP-REQ3 dataset on the the **TV-ARCHIVE Review,Report,Efiles** tab, print the OP-REQ3 form and create the EFile submittal file.

Creating Efile

Electronic files of the Title V OP-UA, OP-SUM, OP-REQ2, and OP-REQ3 data may be created by checking the appropriate checkboxes in the EFile Create column.



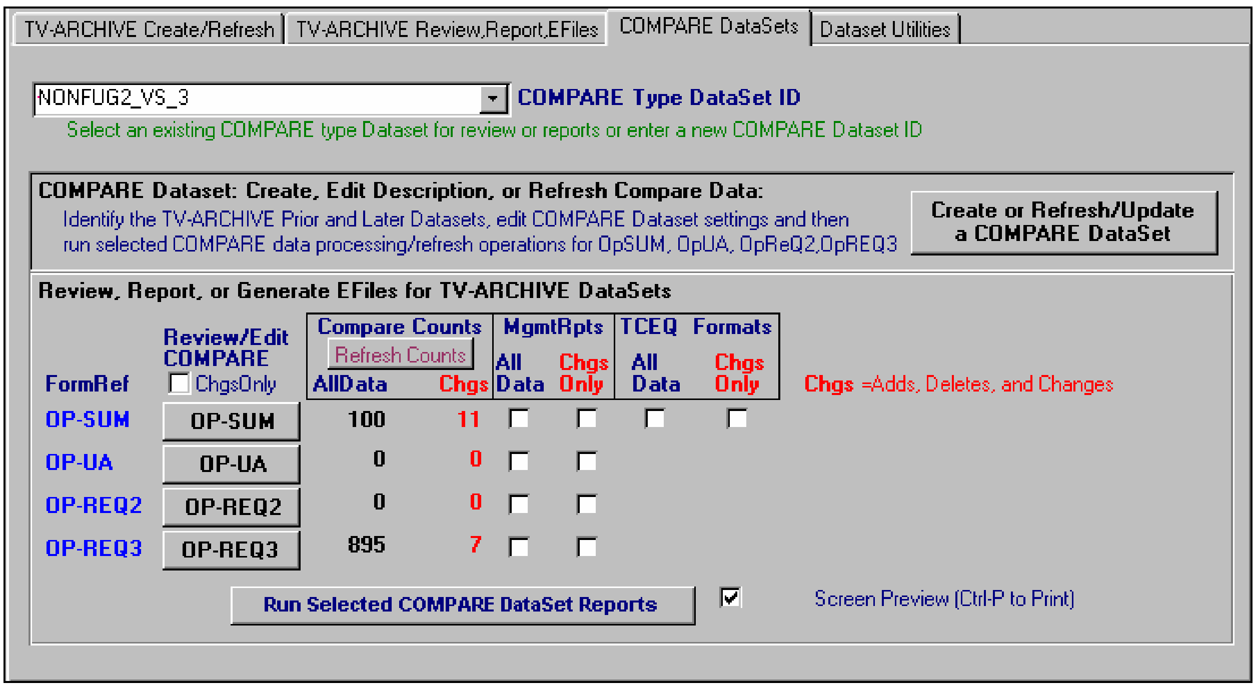
TCEQ Datasets: COMPARE Datasets tab:

COMPARE Datasets are a different type of dataset than ARCHIVE datasets. COMPARE datasets identify differences (or confirm no change) between two ARCHIVE-type Datasets, such as a comparison between an original Title V submittal and the current revised Title V status or revision.

To create a new Compare Dataset....

1.) Enter a new name for the comparison database that will be created in the *Compare Type Dataset ID* box.
2.) Select the **Create or Refresh/Update a COMPARE Dataset** button to open the create/refresh window.

For an existing COMPARE dataset select from the drop-down list presented.



The following section of the User's Manual provide instructions on:

* Create or Refresh/Update a COMPARE Dataset:
  Identify the prior and later Archive datasets and run compare processing
  Edit COMPARE dataset description attributes
* Review/Edit COMPARE Dataset
  OP-SUM, OP-UA, OP-REQ2, and OP-REQ3 data
* Management and TCEQ Report Formats
  Preview and printout AllData and ChgsOnly versions of COMPARE datasets.

The COMPARE DataSets Create or Refresh Screen

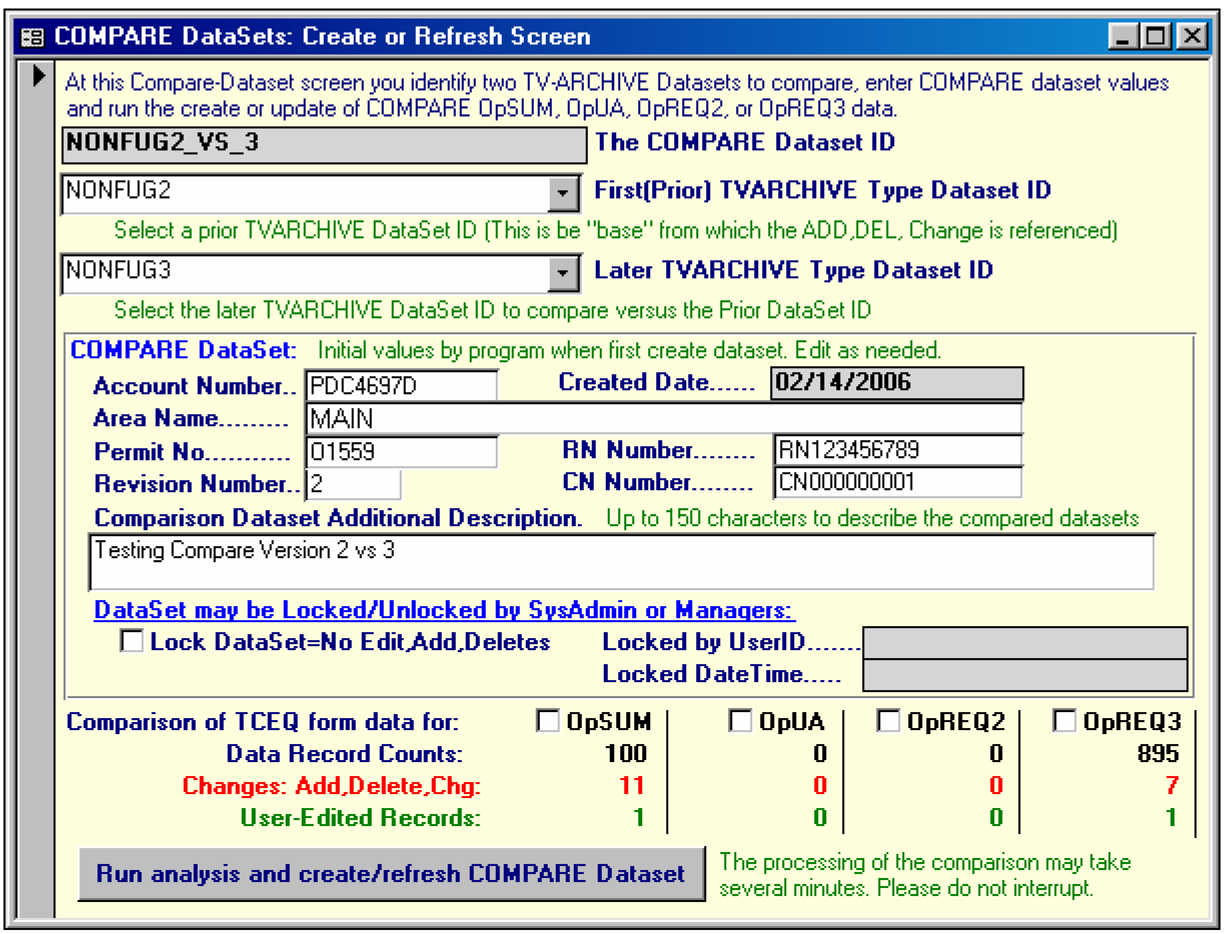
You can create the COMPARE dataset values initially or can remove the data and completely refresh/replace that data. The COMPARE Dataset ID is the dataset selected in the preceding COMPARE Datasets tab of the TCEQ Datasets window.

1.) For a new COMPARE dataset you will need to first select existing Archive-type TCEQ dataset as the First/Prior dataset and then select an existing, later Archive-type TCEQ dataset as the Later dataset for the Comparisons.

2.) After identifying the prior and later datasets the program will lookup and insert initial values for Account Number, Area Name, Permit No, Revision Number, RN Number, and CN Number based on the values in the later Archive dataset.

3.) After the initial values are inserted you can edit those values if required in the data entry fields provided.

It is suggested that you provide an information narrative of the prior vs later dataset comparison in the Comparison Dataset Additional description to document the compare condition.



Check the OpSUM, OpUA, OpREQ2, or OpREQ3 checkbox(s) and select the **Run Analysis and Create/Refresh COMPARE Dataset** button to perform the COMPARE data processing.

After running the create/refresh the total record counts and Changes: Add,Delete,Chg count will be displayed for the COMPARE dataset for each TCEQ format OpSUM, OpUA, OpREQ2, and OpREQ3. Close the screen to return to the TCEQ Datasets: COMPARE Datasets form/tab.

COMPARE Datasets are populated by first clearing any existing data then...

Note that the KeyValue, SecondaryKey, and FullMatch string values are different for each format OpSUM, OpUA, OpREQ2, OpREQ3 but the general process steps 1) through 3) are followed for each COMPARE dataset create/refresh.

1.) Loading all records from the later Archive dataset into the COMPARE data table placing the identifier and keyvalue strings into the appropriate fields.
   a.) Add COMPARE record...
   b.) Record the KeyValue, SecondaryKey, and FullMatch string values for Later

2.) For each record in the Prior Archive dataset lookup the KeyValue as stored from the Later Archive dataset in the COMPARE dataset (as in step 1).
   a.) If matched=found, then....
      * Record the SecondaryKey, and FullMatch string values from Prior data
      * If SecondaryKey or FullMatch not identical, identify as CHG
        else... all match=NoCHG
   b.) If the KeyValue in Prior Archive not found then ...
      * Add COMPARE record...
      * Record the KeyValue, SecondaryKey, and FullMatch string values for Prior
        Set change type to "D"=Deleted to record the KeyValue deletion

3.) For all Later Dataset-based COMPARE records not KeyValue matched...
   Set change type to "A"=Add to record the new KeyValue add

* In the COMPARE Dataset status counts the "A"=Add plus "D"=Delete, plus "C"=Change records as referred to as "Changed" data.

General Operation Features for COMPARE OPSUM, OPUA, OPREQ2 and OPREQ3

At the TCEQ Datasets: COMPARE Datasets tab:

If Compare data has been created (record count > 0) for the designated TCEQ COMPARE dataset format, then that data can be reviewed in form screen view and in generated reports.

For form review and optional editing....

1.) Select the OPSUM,OPUA,OPREQ2, or OPREQ3 button in the Review/Edit COMPARE area to open the review/edit data entry form screen.

    Note that you can optionally just review Changed data by checking ChgsOnly

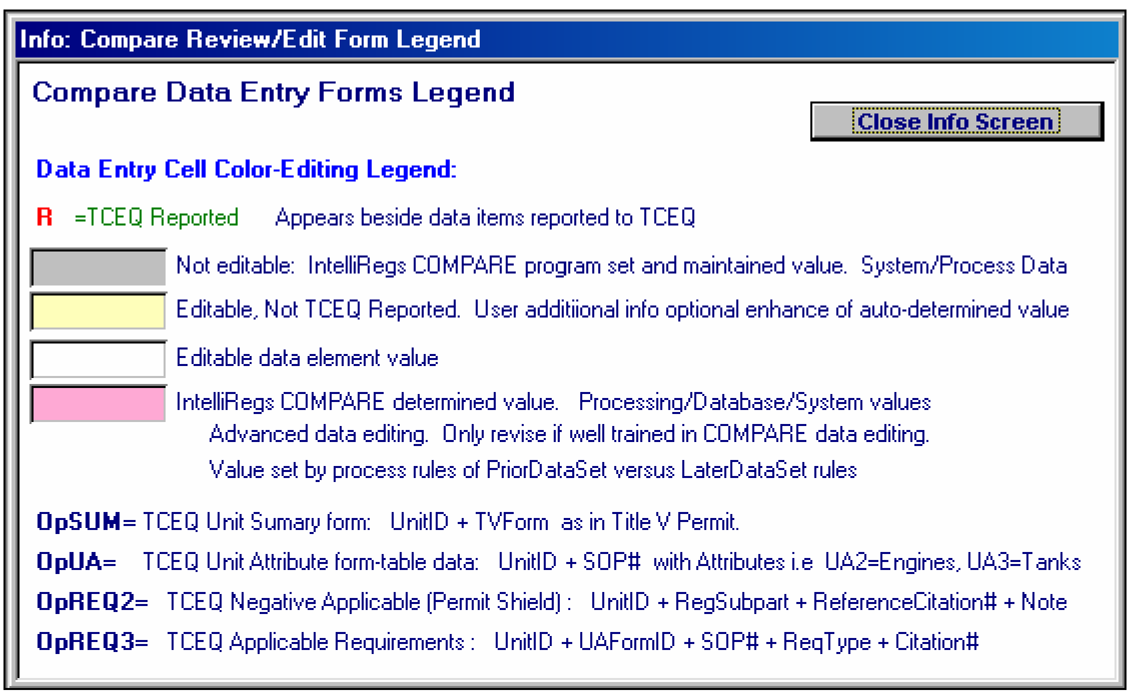
2.) The change indicator A,D,C or blank and all data values in the COMPARE dataset records are initially set during the Create/Refresh COMPARE dataset processing. This should be complete and accurate.

    PDC suggests making any required changes by editing the current, existing IntelliRegs data, regenerating the later Archive dataset and then rerunning the COMPARE Create/Refresh.

3.) If direct edits of the COMPARE dataset for OPSUM,OPUA,OPREQ2, or OPREQ3 the use the data entry screen to revise values or to add or delete entire records. The changes will be immediatedly reflected in the reports.

    * Use extreme care in making COMPARE dataset data adds or edits as some data elements should be well understood before performing the data revisions. *

The legend for COMPARE OPSUM,OPUA,OPREQ2, or OPREQ3 data review and date editing screens is available for screen display by selecting the **Edit Legend** button at the top of those screens as shown below.



For COMPARE dataset reports check the desired reports and then...

Select the **Run Selected COMPARE DataSet Reports** button.

Option: Preview or send directly to default printer

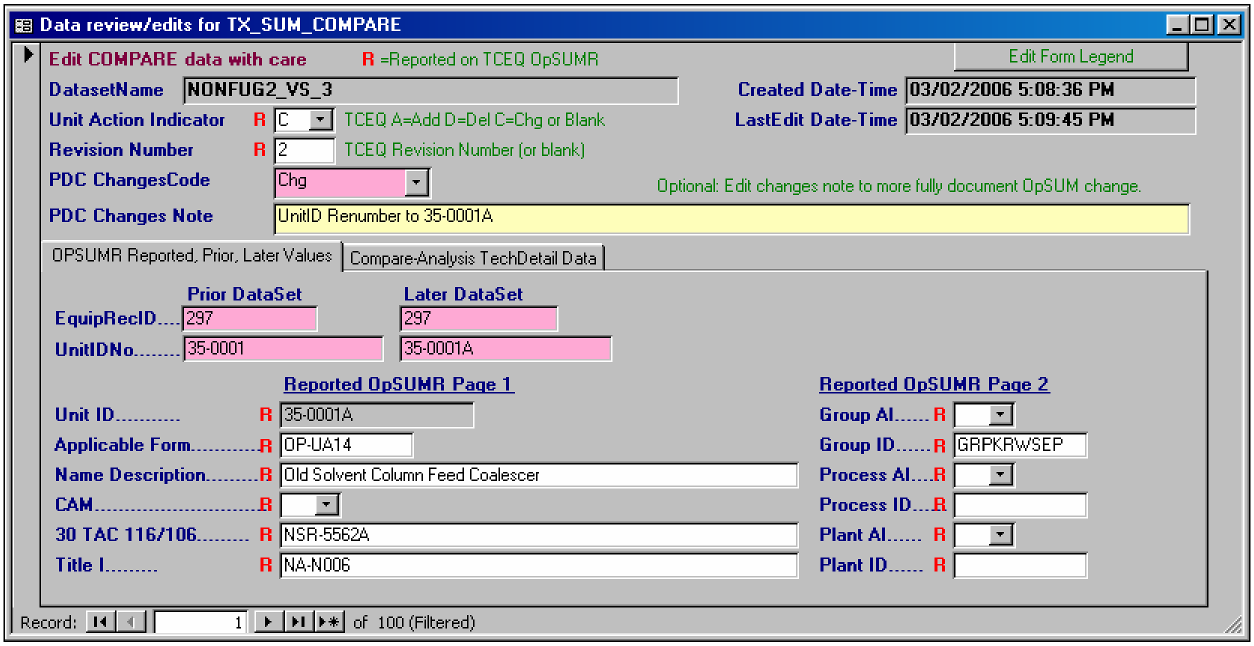
Specific examples and instructions for the OpSUM, OpUA, OpREQ2, and OpREQ3 COMPARE dataset data follows.

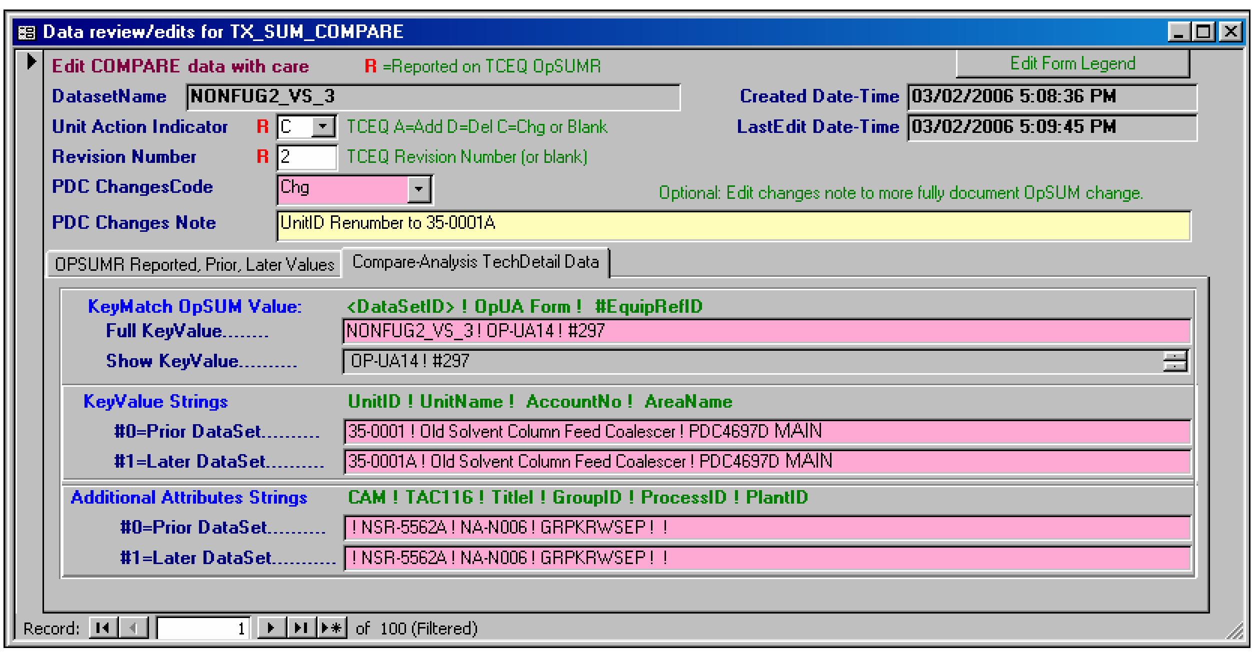
OPSUM Compare

At the TCEQ Datasets: COMPARE Datasets tab:

For form review and optional editing....

1.) Select the OPSUM button in the Review/Edit COMPARE area to open the review/edit data entry form screen.





* See TCEQ instructions for the OPSUM and OPSUMR forms for field definitions and additional information.

OP-UA Compare and OP-REQ2 Compare

Use similar steps for creating, reviewing, and reporting of OP-UA and OP-REQ2 COMPARE datasets as used for the OP-SUM COMPARE datasets.

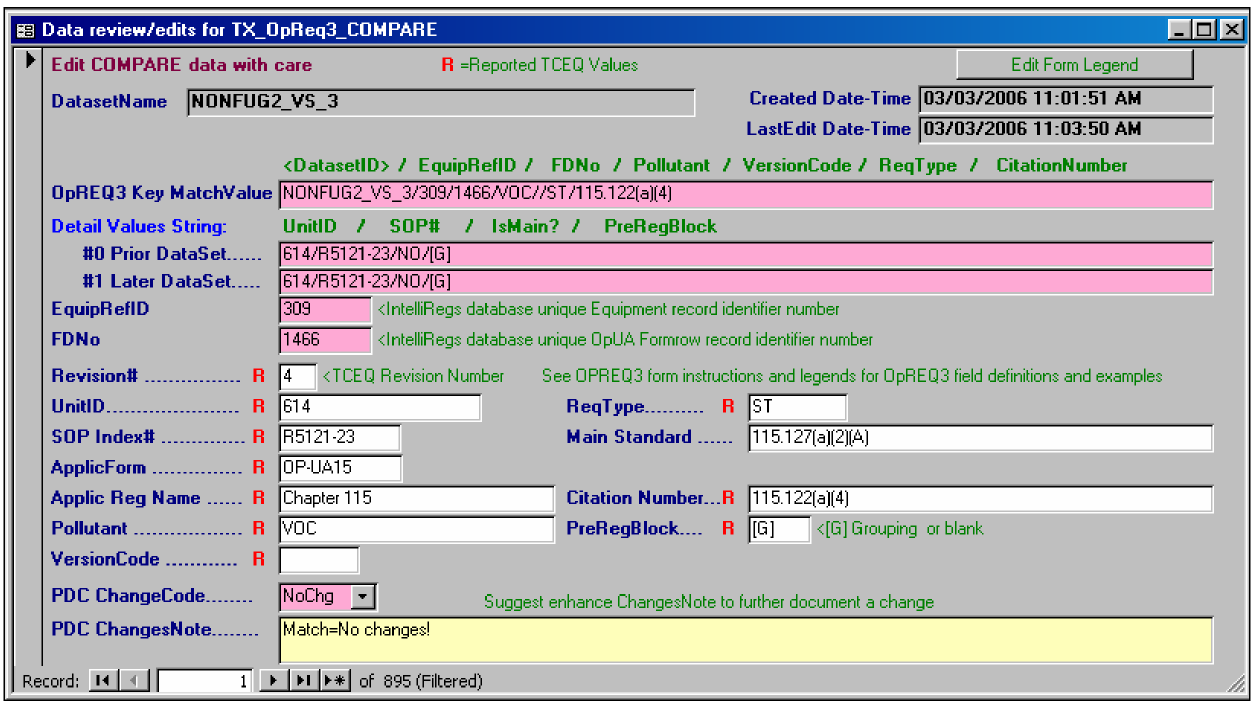
Of course the data will contain OP-UA and/or OP-REQ2 elements in place of the OPSUM data element names.

OP-REQ3 Compare

The OP-REQ3 COMPARE dataset examines each Key Matchvalue of
EquipID + OpUAForm + Pollutant + VersionCode + ReqType + Citation
to identify ADD or DELETE OP-REQ3 records.

The OP-REQ3 COMPARE dataset compares the Details Value String values of
UnitID + SOP# + IsMain + PreRegBlock
to determine if a Key Matched item is UNCHANGED or CHANGED.

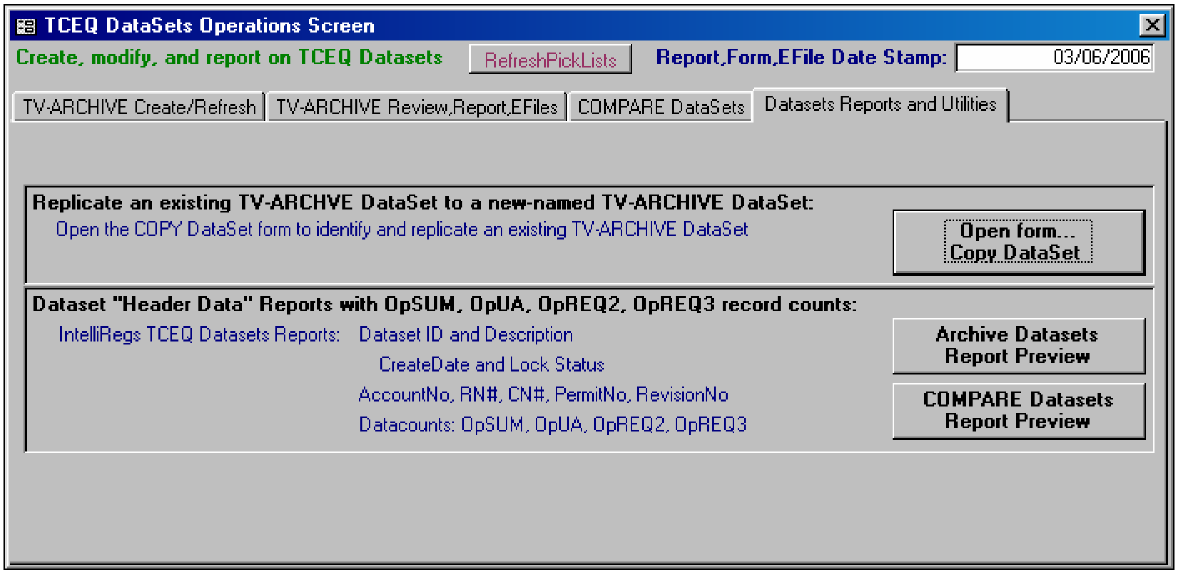
If a DetailValuesString change then the COMPARE processing will identify the fields changed into the PDC ChangesNote field.



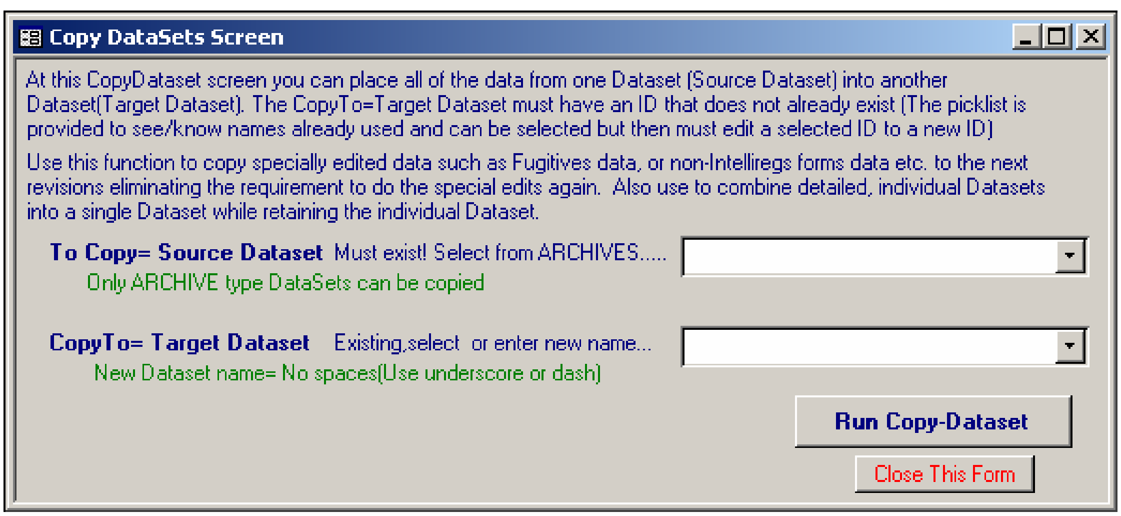
DataSet Reports and Utilities

Copy Dataset and Archive and COMPARE DataSet Reports

Copy Dataset copies the data from one Dataset (Source Dataset) to another Dataset (Target Dataset).



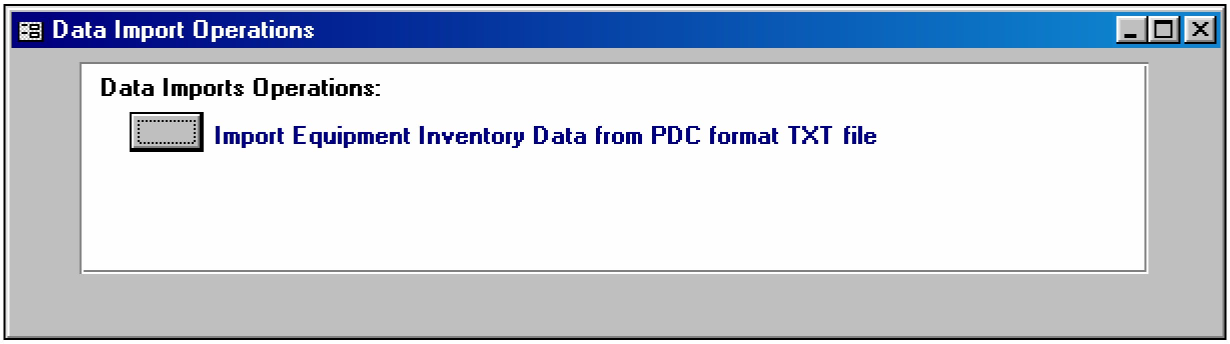
Select the dataset to copy information from in the drop-down list *To Copy= Source Dataset*. Then select the dataset to copy the information into from the drop-down *list Copy To= Target Dataset*, or enter a new name. Then, select the **Run Copy-Dataset** button.



E. TV Import

<u>Selection of Import/Export Operation</u>

After choosing the *Equipment Import/Export* option from the IntelliRegs Menu Bar: *TEXAS*-P*ermit-RegOps*, the ***Data Import*** form will be opened as shown below:



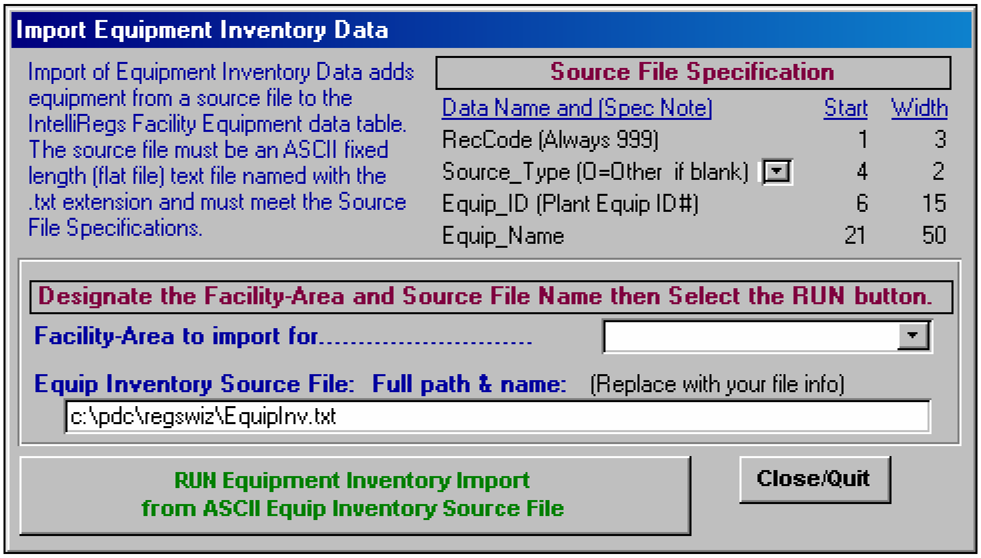
Select the import command button to open another form where specifications will be entered for the import operation. Each import operation and its data entry screen are reviewed in the following paragraphs within this section of the User's Manual.

If you are importing data and some data for your account already exists, it is recommended that your data file be backed up prior to performing the import to enable your data to be restored in the unlikely event that the import did not add the records you desired.

Please follow the specifications and instructions exactly as defined for each operation. Imports are very powerful performed according to the input values you enter.

Data Import: Import Equipment Inventory Data

After selecting the **Import Equipment Inventory Data…** command button at the ***Data Import Operations*** window, the ***Import Equipment Inventory Data*** dialog window will open as shown below:



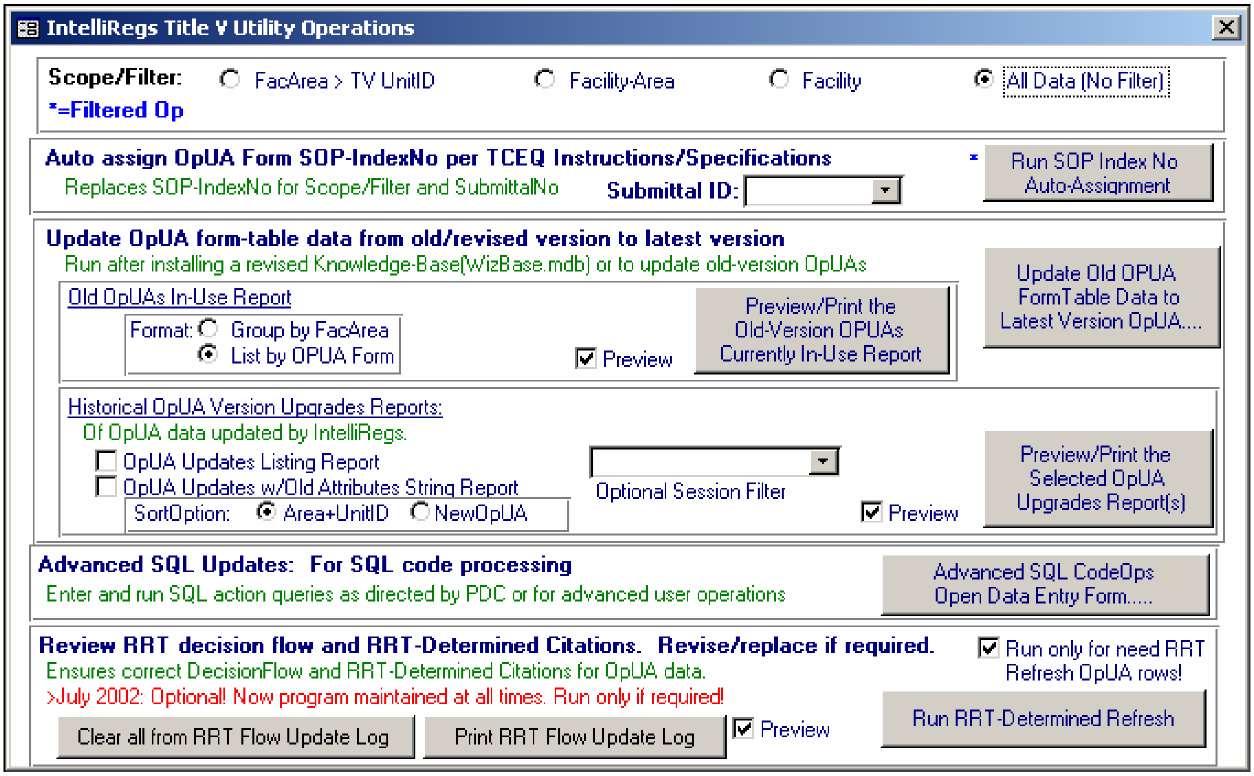
This import is made from an ASCII file meeting the specifications as shown on the import screen. Outputs from facility maintenance databases, or asset management systems, should be able to be created by IS/IT departments to meet these specifications. Contact PDC if further assistance is needed to communicate this import file specification to your IS/IT personnel.

Upon import, new equipment records will be added for each of the imported data rows for Equip_IDs that do not already exist. You will want to review each new equipment item to edit values as required.

F. TV Utilities

Selection of Title V Permit & Applicability Utility Operation

After choosing the ***RegApp TV Utilities*** option from the IntelliRegs Menu Bar: *TEXAS*-Permit-*RegOps*, the ***Title V Utility Operations*** form will be opened as shown below:



The ***Title V Utilities*** screen enables selection from six utility operations:

1.) Run SOP Index No Auto-Assignment
2.) Run Old to New OP-UA Form Data-Transfer
3.) Run RegApplic Categories
4.) Run Equipment Unit Types
5.) Run Advanced SQL Updates
6.) Run RRT Flow Review/Update

The ***Utilities*** screen briefly describes each utility operation. Additional instructions and information on these operations is provided in the following paragraphs in this section of the User's Manual.

Run SOP Index No Auto-Assignment

Each OP-UA form row must have an SOP Index number assigned that meets TCEQ specifications for SOP Index numbering. For example, OP-UA3-Table 3 data rows must begin with 60Kb- and then have a number, i.e. 1, 2, 3. This auto-assign utility replaces all OP-UA data rows for the selected Submittal ID (or all if the Submittal ID is left blank) with valid, unique SOP Index numbers.

Most users will only run this utility after most (or all) OP-UA data rows are entered. Because the TCEQ will refer to the SOP Index number of the original submittal, the numbers should be preserved and maintained after submittal of the original application.

- See TCEQ's SOP Index No Instructions for complete specifications on assignment of SOP Index Numbers.

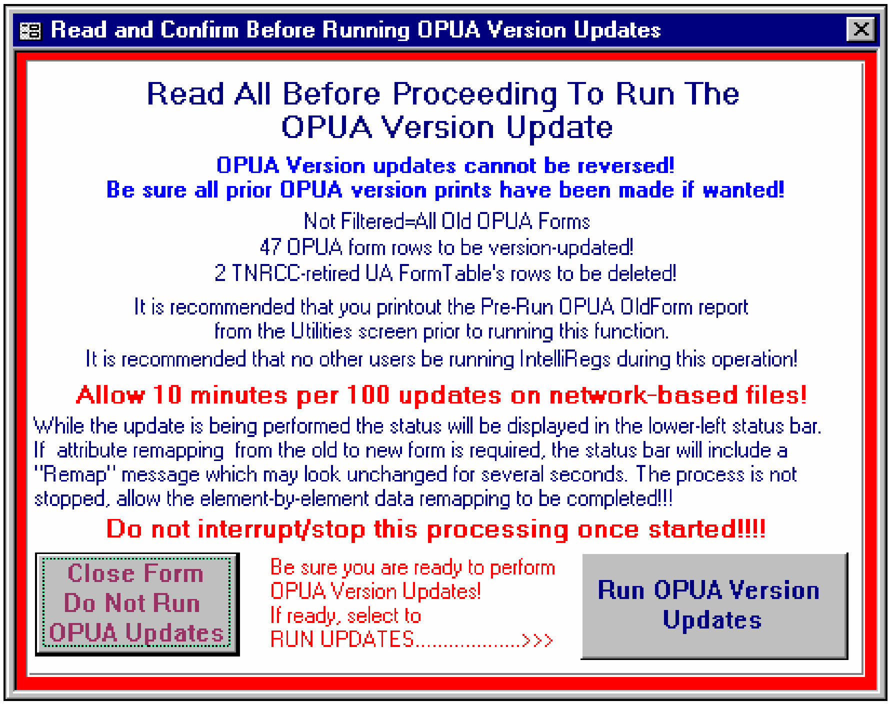
After running the SOP Index No auto assignment utility, you can edit any OP-UA row SOP Index numbers at the ***OP-UA*** data entry screen (See User's Manual **Section 2: C4**); or the SOP Index numbers can be edited in the ***OpUA KeyDat Fast*** screen.
(See User's Manual **Section 2: H**)

The auto-assigned SOP IndexNo's will use valid TCEQ prefixes and assign unique numbers. However, because of optional "attribute-set" SOP IndexNo groupings, i.e., the same SOP-IndexNo for multiple OP-UA "profiles", you may want to edit the SOP IndexNo as desired. After running the SOP-IndexNo auto-assign and editing your SOP Index Nos., you should not run the auto-assign again or your changes/edits will be lost!

Run Old to New OP-UA Form Data-Transfer

The *Run Old to New OP-UA Form Data-Transfer* utility is a powerful operation that analyses all existing OP-UA data and determines if any "Old OP-UA Form Data" exists that has not been placed into a newer/revised version. Before actually running the old to new data-transfer, the program indicates the number of OP-UA rows to be transferred and requires the user to OK or Cancel to perform (or cancel) the data transfer.

The **INFO** command button in the *Run Old to New OP-UA Form Data-Transfer* area of the ***Title V Utilities*** screen provides online information to the user regarding the Old-To-New Data Transfer process. An example of this **INFO** dialog box is shown below:



You can indicate the Old and New submittal IDs to be assigned, Old and New OP-UA forms, or leave these cells blank to have the new submittal id number made the same as the Old OP-UA data row.

The *Run Old to New OP-UA Form Data-Transfer* utility should be run after receiving an updated Knowledge Base (WizBase.mdb) from PDC. The updated Knowledge Base will contain the latest OP-UA form versions and a "ancestor OP-UA forms" table that indicates prior to new form migration/evolution mappings.

Upon the completion of the *Old-To-New OP-UA* data transfer, new OP-UA form data will be created for old data. The prior, old form data will not be deleted, remaining available for review. All Old To New data transfers are recorded in the RevAdds History Table, and can be reviewed and/or printed by selecting the **Print RevAdds History…** command button. An example printout from the RevAdds History table is in Section 3 of this User's Manual, ItemID=UT-1.

The record of the Old To New data transfer in the RevAdds History table includes a summary of the extent of data migration adjustments necessary for the data migration, and a Confidence Percent. The Confidence Percent assesses the certainty (or uncertainty) that the data migrations are complete and accurate.

A 100% Confidence Percent represents data that migrated to known columns with values valid on the old and new form without adds or deletes of attributes which might affect interpretation of rule applicability. Certainty is reduced if attributes are added or shifted in position, or deleted from the old form to the new form. In general, any certainty level other than 100% should be examined to insure that the selected OP-UA attribute values are complete and correct for the equipment item and material for the new form.

Run Advanced SQL Updates

SQL queries can be created and run at the *Advanced SQL Update* screen. Example SQL code is provided with the IntelliRegs database. Additional SQL update code may be added to the Advanced SQL Example Code library.

Caution: SQL operations can only be run by Administrator rights-level users. Extreme care must be followed to see that the updates, inserts, and/or deletes performed by the SQL code are exactly what is intended. Contact PDC if there are any questions on use of the advanced SQL feature.

Run RRT Flow Review/Update

The *Run RRT Flow Review/Update* is a utility that insures the each OP-UA form row's RRT Decision Flow is current and in accordance with the latest version of the OP-UA form and TCEQ RRT rules.

Run this utility after receiving an upgrade to the Knowledge Base (WizBase.mdb). You can also run this utility after performing extensive OP-UA data row entry and/or edits to insure that all RRT Decision Flow and subsequent RRT Determined citations are correct and current.

This update deletes all previous RRT Determined citations and completely reprocesses all OP-UA form attribute data with the latest RRT decision formulas.

If any RRT Flows are found to be incorrect, then the OP-UA data row identification and the first part of the new RRT Decision flow string is recorded into the RRT Flow Update Log table. A preview and/or printout of the *RRT Flow Update Log* is selectable from the ***Utilities*** screen.

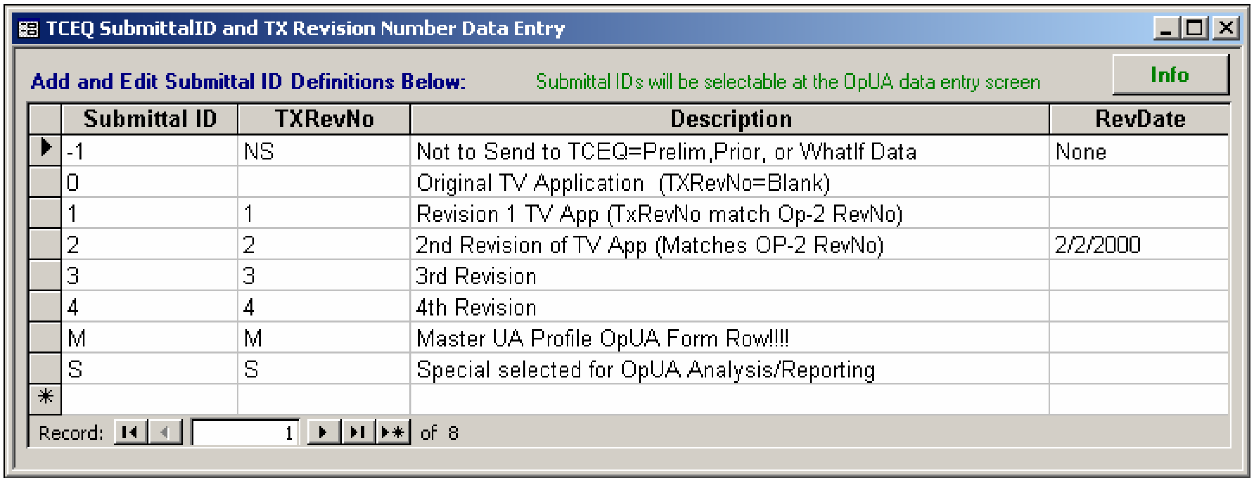
- See Section 3: Item UT-2 for an example printout of the Update Log.

The *Run RRT Flow Review/Update* should be run at any time the management or dataset creation outputs <u>do not seem to agree</u> with known data in the OP-UA forms, or as displayed as determined applicable or negative applicable citations. It is possible that certain edit sequences may fail to set OP-UA data for automatic refresh which is performed by each of the report run operations if required. The *RRT Flow Review/Update* utility will refresh and replace all OP-UA and RRT determined values insuring that any "need to be refreshed" data is made current.

G. TV Submittal Nos.

Add/Edit TV Submittal Nos

After choosing the *TV SubmittalNo* option from the IntelliRegs Menu Bar, *TEXAS-Permit-RegOps*, the ***TCEQ SubmittalID and TX Revision Number Data Entry*** screen is opened as shown below:

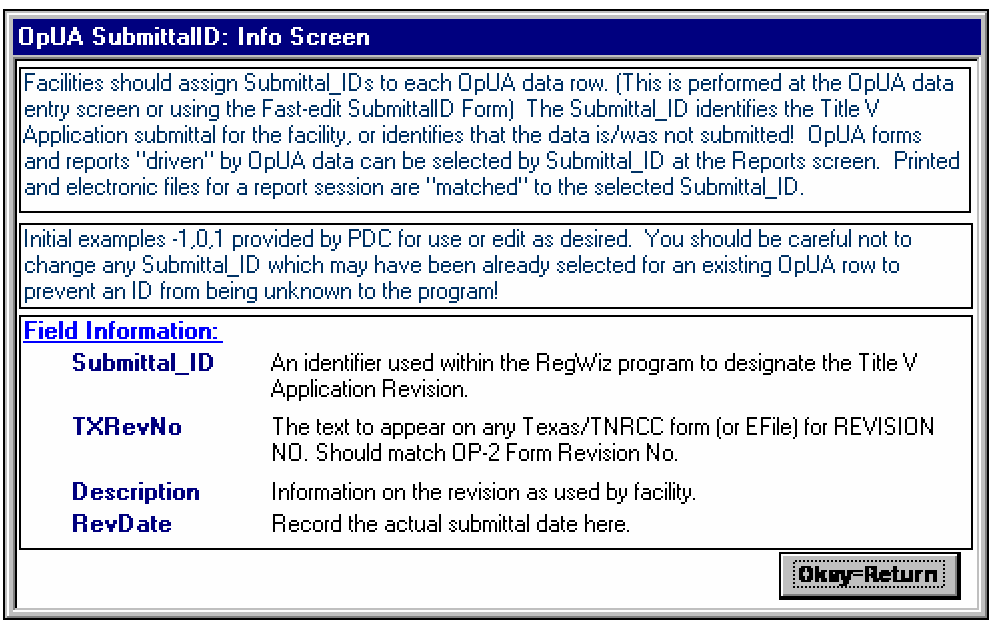

TCEQ SubmittalID and TX Revision Number Data Entry

Add and Edit Submittal ID Definitions Below: Submittal IDs will be selectable at the OpUA data entry screen Info

Submittal ID	TXRevNo	Description	RevDate
-1	NS	Not to Send to TCEQ=Prelim,Prior, or WhatIf Data	None
0		Original TV Application (TXRevNo=Blank)	
1	1	Revision 1 TV App (TxRevNo match Op-2 RevNo)	
2	2	2nd Revision of TV App (Matches OP-2 RevNo)	2/2/2000
3	3	3rd Revision	
4	4	4th Revision	
M	M	Master UA Profile OpUA Form Row!!!!	
S	S	Special selected for OpUA Analysis/Reporting	

Record: 1 of 8

The **INFO** command button provides online Submittal ID information as shown below:


OpUA SubmittalID: Info Screen

Facilities should assign Submittal_IDs to each OpUA data row. (This is performed at the OpUA data entry screen or using the Fast-edit SubmittalID Form) The Submittal_ID identifies the Title V Application submittal for the facility, or identifies that the data is/was not submitted! OpUA forms and reports "driven" by OpUA data can be selected by Submittal_ID at the Reports screen. Printed and electronic files for a report session are "matched" to the selected Submittal_ID.

Initial examples -1,0,1 provided by PDC for use or edit as desired. You should be careful not to change any Submittal_ID which may have been already selected for an existing OpUA row to prevent an ID from being unknown to the program!

Field Information:

Submittal_ID	An identifier used within the RegWiz program to designate the Title V Application Revision.
TXRevNo	The text to appear on any Texas/TNRCC form (or EFile) for REVISION NO. Should match OP-2 Form Revision No.
Description	Information on the revision as used by facility.
RevDate	Record the actual submittal date here.

Okay=Return

Submittal IDs are important to designate OP-UA form data revision numbers. A user can add, edit or delete Submittal IDs as desired.

> **Note**: The Submittal ID=0 has a blank TX RevNo value. This causes a blank to be entered into the OP-UA forms Revision Number column as specified by the TCEQ for original Title V permit data. Subsequent revision coding should agree with TCEQ issued permit advice on the labeling of revisions, and should agree with OP-2 form data. (The OP-2 form is not prepared within IntelliRegs, but IntelliRegs data should be in agreement with this data, which will be submitted with electronic submittal files!)

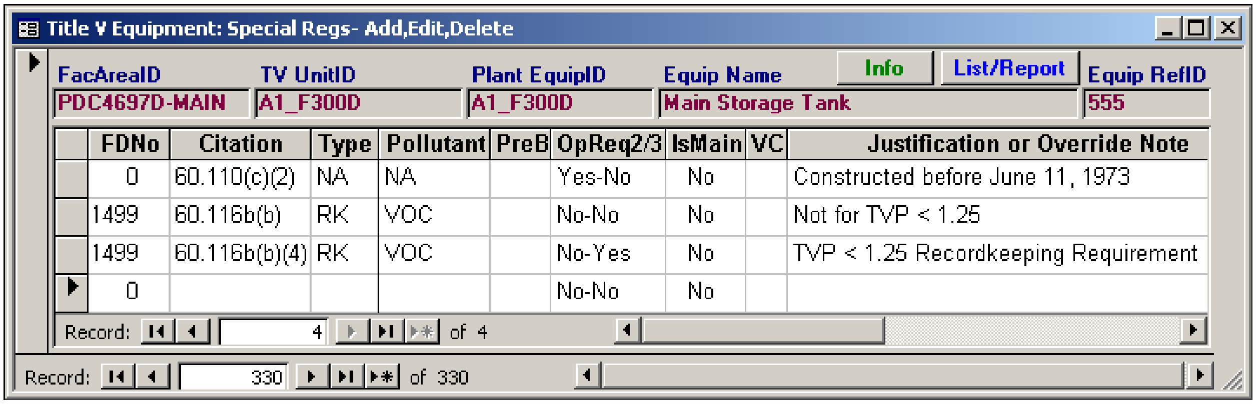
Use submittal ID to identify the actual original OP-UA form data from preceding=old OP-UA form data. Also use submittal ID to identify OP-UA form data which is for revision 1, 2, 3, etc.

Submittal ID is selected in the header section of each OP-UA data entry form. Submittal ID can also be reviewed and edited in the ***OpUA KeyData Fast*** data entry window.

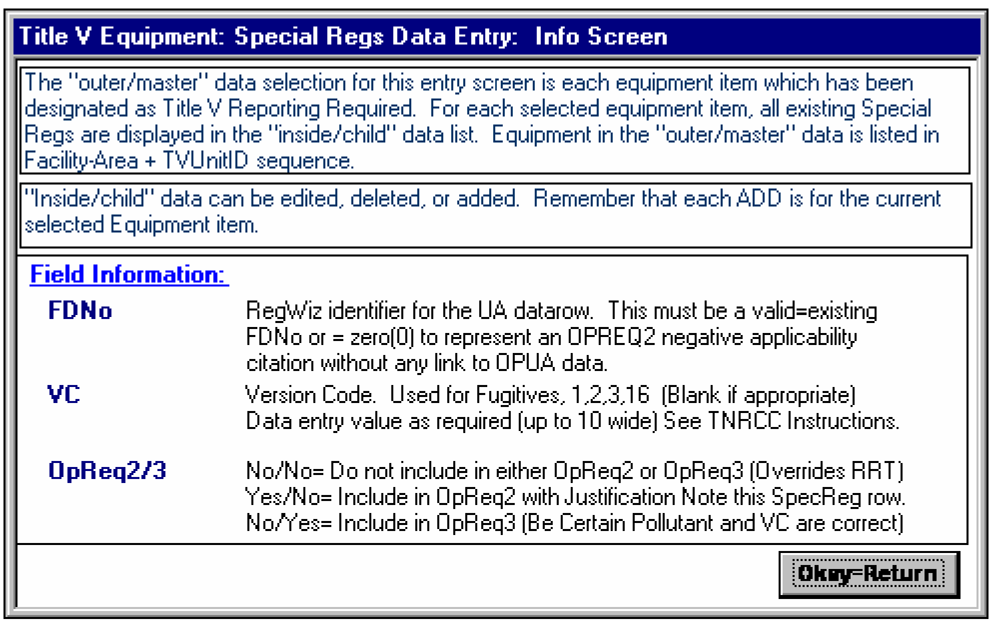
H. TV SpecialRegs-Fast

Data Entry for Special Regs

After choosing the *TV SpecialRegs-Fast* option from the IntelliRegs Menu Bar: *TEXAS-Permit-RegOps*, the ***Title V Special Regs Add,Edit,Delete*** screen is opened as shown below:



The **INFO** command button on the ***Special Regs Add,Edit,Delete*** screen provides online information as shown below:



The **LIST/REPORT** command button previews and optionally enables printing of the Special Regs List report. (See Section 3: Example Item SR-1)

Special Regs are added to:

1.) Create “debit” and “credit” transactions for OP-UA RRT-Determined applicability.
2.) Add Negative Applicability notes for OP-REQ2 form Reason.
3.) Add Negative Applicability citation and notes for Equipment-direct negative applicables.

Special Regs adds of type 1.) and 2.) above can be viewed and also added from the *Equipment-OP-UA* data entry operation. (See User’s Manual **Section 2: C4**)

Special Regs adds of type 3.) can be viewed and also added from the **Equipment: OP-REQ2** Tab data entry operation. (See User’s Manual **Section 2: C5**)

The ***TV SpecialRegs-Fast*** data entry provides for review and data entry of all Special Regs for all equipment items for OP-UA or direct data.

> **Note**: A FDNo=0 indicates a “direct” Special Reg not referencing any OP-UA form row. A positive FDNo identifies the OP-UA row that the Special Reg is associated with for “debit” and “credit” of RRT-Determined citations.

The ***TV SpecialRegs-Fast*** screen enables identical Special Regs for different equipment items to be quickly copied and pasted. After pasting, the FDNo for >0 OP-UA reference must be edited to the proper OP-UA number for the other (copied-to) equipment item.

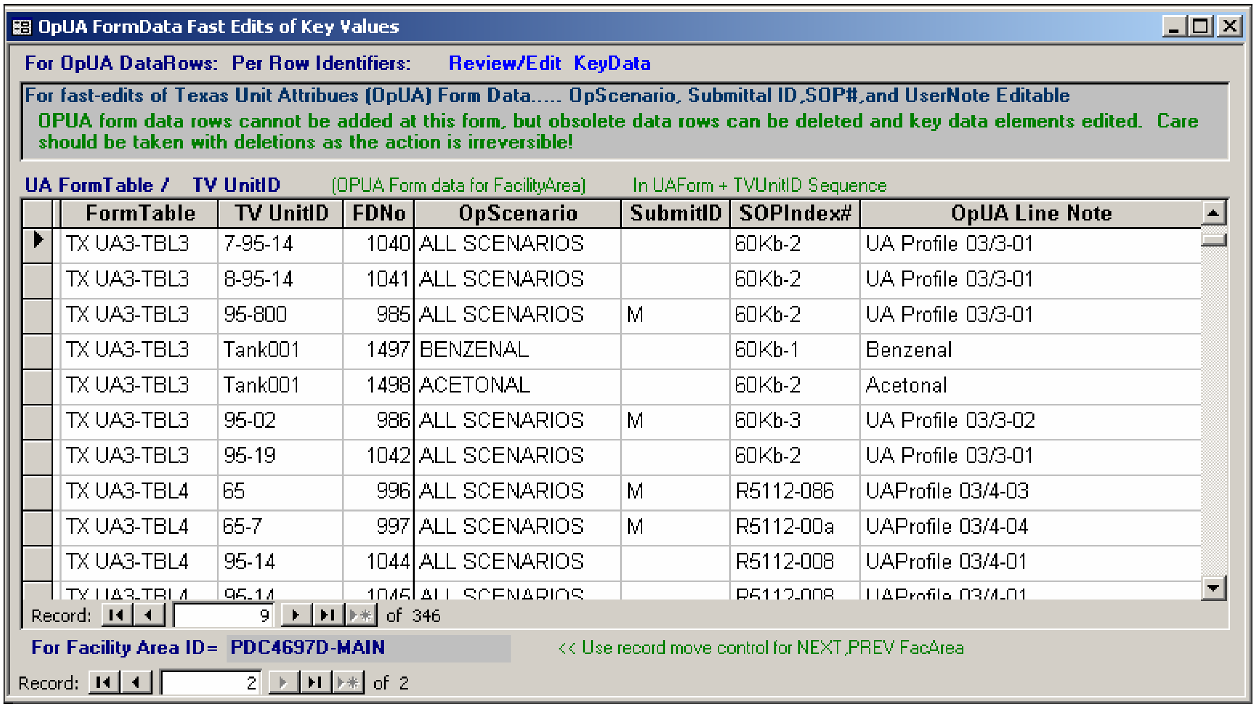
Selection of FDNo can be made from a dropdown list that lists all OP-UA forms for the particular equipment item. You should always use the dropdown list to insure that the correct FDNo is assigned. If an incorrect FDNo is entered at this screen, the next screen session will show the Special Reg mapped to the equipment item of the incorrectly entered FDNo. Make sure FDNos are correct and for the intended equipment OP-UA row before leaving the screen=saving the data for that equipment item.

Review of created OP-REQ2 and OP-REQ3 datasets and review of management reports **B5** will enable you to confirm that your Special Regs “debits” and “credits” have been made properly.

I. TV UA-KeyData-Fast

Data Entry of Key Data

After choosing the *OpUA KeyData Fast* option from the IntelliRegs Menu Bar*: TEXAS-Permit-RegOps*, the ***OpUA Fast Edits of Key Values*** screen is opened as shown below:



OpUA FormData Fast Edits of Key Values

For OpUA DataRows: Per Row Identifiers: Review/Edit KeyData

For fast-edits of Texas Unit Attribues (OpUA) Form Data..... OpScenario, Submittal ID,SOP#,and UserNote Editable
OPUA form data rows cannot be added at this form, but obsolete data rows can be deleted and key data elements edited. Care should be taken with deletions as the action is irreversible!

UA FormTable / TV UnitID (OPUA Form data for FacilityArea) In UAForm + TVUnitID Sequence

FormTable	TV UnitID	FDNo	OpScenario	SubmitID	SOPIndex#	OpUA Line Note
TX UA3-TBL3	7-95-14	1040	ALL SCENARIOS		60Kb-2	UA Profile 03/3-01
TX UA3-TBL3	8-95-14	1041	ALL SCENARIOS		60Kb-2	UA Profile 03/3-01
TX UA3-TBL3	95-800	985	ALL SCENARIOS	M	60Kb-2	UA Profile 03/3-01
TX UA3-TBL3	Tank001	1497	BENZENAL		60Kb-1	Benzenal
TX UA3-TBL3	Tank001	1498	ACETONAL		60Kb-2	Acetonal
TX UA3-TBL3	95-02	986	ALL SCENARIOS	M	60Kb-3	UA Profile 03/3-02
TX UA3-TBL3	95-19	1042	ALL SCENARIOS		60Kb-2	UA Profile 03/3-01
TX UA3-TBL4	65	996	ALL SCENARIOS	M	R5112-086	UAProfile 03/4-03
TX UA3-TBL4	65-7	997	ALL SCENARIOS	M	R5112-00a	UAProfile 03/4-04
TX UA3-TBL4	95-14	1044	ALL SCENARIOS		R5112-008	UAProfile 03/4-01
TX UA3-TBL4	95-14	1045	ALL SCENARIOS		R5112-008	UAProfile 03/4-01

Record: 9 of 346

For Facility Area ID= PDC4697D-MAIN << Use record move control for NEXT,PREV FacArea

Record: 2 of 2

All data editable on this screen is also editable at each ***Equipment-OP-UA*** form data entry screen. (See User's Manual **Section 2: C5**.) This screen provides "all OP-UA data rows" view and editing of "Keydata" items in a spreadsheet… fast edit format.

You may review the "Keydata" of each OP-UA data row in your Title V Permit & Applicability data in this screen. Submittal ID, Overrides, and SOPIndexNo can be edited. Other fields are not editable=read only.

> **Note**: If you revise the Overrides value, you must run the TV Utility: RRT Refresh or open the Equipment: OP-UA Form record to create/refresh the RRT Flow string and/or revise the RRT determined citations list.

The screen also enables deletions to be made by highlighting one or more rows and pressing the **<Delete>** key. Multiple row deletions may be appropriate after reviewing Old-To-New data migrations and accepting the new OP-UA version data and wishing to delete Old OP-UA data rows.

J. TV OpUA Profiles

Create/Edit OpUA Profiles

Use of OpUA Master and member profile functions enables identical equipment to be managed more efficiently by performing data entry for the Master data and replicating it to all members.

Each member of the profile should be identical in OpUA attribute values, OpSum values, and OpReq2 and/or OpReq3 citation applicability.

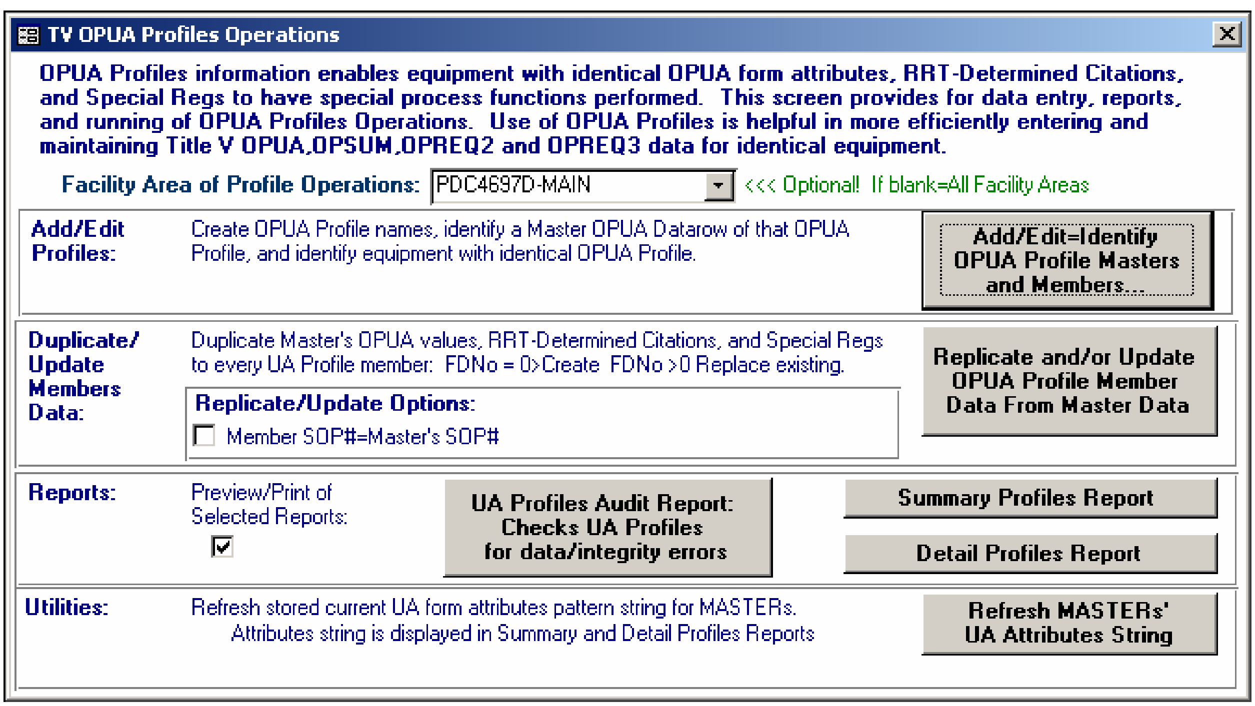
If for any reason a member is no longer identical to other members, it must be reassigned to another correct UA Profile group, or a new Profile group created to represent that profile.

OpUA Profile identification and use is optional in IntelliRegs. A user may choose to perform all maintenance on equipment individually.

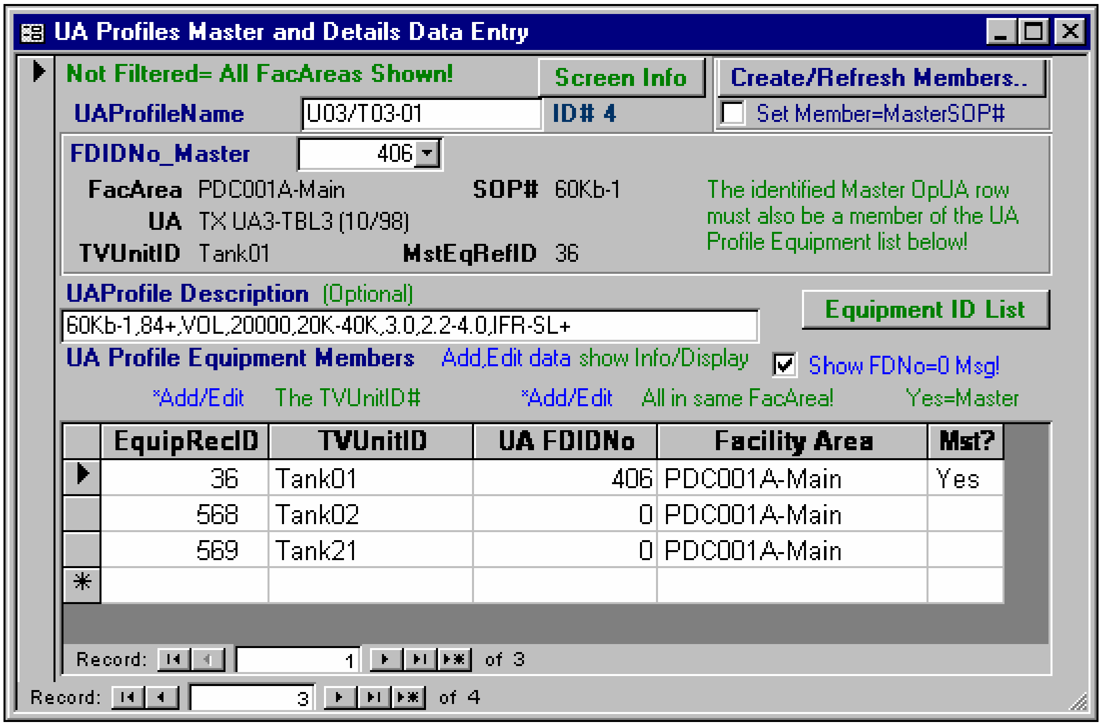
A complementary capability in IntelliRegs can be utilized to deal with “Masters” only by assigning “M” for the submittal ID for OpUA forms of masters. Datasets can then be created and reports printed only for these “M” OpUA data. This enables reviews to focus on Masters only.

After identifying equipment with like UA attribute strings, enter the OpUA data on the appropriate UA form for the Master piece of equipment, entering an “M” in submittal ID. Make adjustments to the generated citations with Special Regs to equal the TV submittal. Note the FD# on the UA form.

After selecting *TV OPUA Profiles* from the *Reg-Applic-Ops* menu, the *TV OPUA Profiles Operations* main screen opens as shown below:



Select a Facility Area from the drop down, then select the *Add/Edit=Identify OPUA Profile Masters and Members…* button. The *UA Profiles Master and Details Data Entry* screen is shown below:



Enter the Form and Table number in the UAProfileName field. The -01 represents the first UA attribute string on that form. Subsequent different attribute strings would have the same Form and Table name, but -02, -03, etc. Next enter the FD# from the Form in the FDIDNo_Master field. You may optionally enter the UA attributes in the UAProfile Description field to further describe this profile.

Once you tab off of the description field, or place your cursor in the EquipRecID field, the program will fill in the EquipRecID #, TVUnitID, UA FDIDNo, Facility Area, and Mst? Yes fields for the FD# indicated for the Master equipment item.

Enter members of the profile by entering, or selecting from the drop down, the EquipRecID. Once you tab off of the EquipRecID field, the program will fill in the TVUnitID, Facility Area, and a UA FDIDNo of "0". This means that no UA data row yet exists for the member. You will be prompted to confirm that you want to add a UA data row identical to the Master equipment data.

After entering all of the members of this profile, select the *Create/Refresh Members…* button in the upper right corner of the screen. This will copy all of the UA attributes from the Master to all the Members and assign UA FDIDNos equal to the Master. If you wish to make the SOP Index # of the Members different from the Master, you must go to each equipment item and change the number on the form. After the profile is created, the program will not reassign SOP Index #s unless you optionally check the box *Set Member=MasterSOP#.*

Any time changes are made to the Master equipment item, the profile should be refreshed to update the members.

Profiles may also be created by entering all of the Masters and Members under the correct profile name, then selecting the *Replicate and/or Update OPUA Profile MemberData from Master Data* button on the main profile screen. This operation may take awhile depending upon the number of profiles to be replicated. This function is also useful when making changes to OPUA data on multiple forms without having to refresh each profile individually.

After creating and replicating profiles, run the *UA Profile Audit Report* to check for data/integrity errors. The *Summary Profiles Report* and the *DetailProfiles Report* may be run to verify that all Master/Members are in the correct profile.

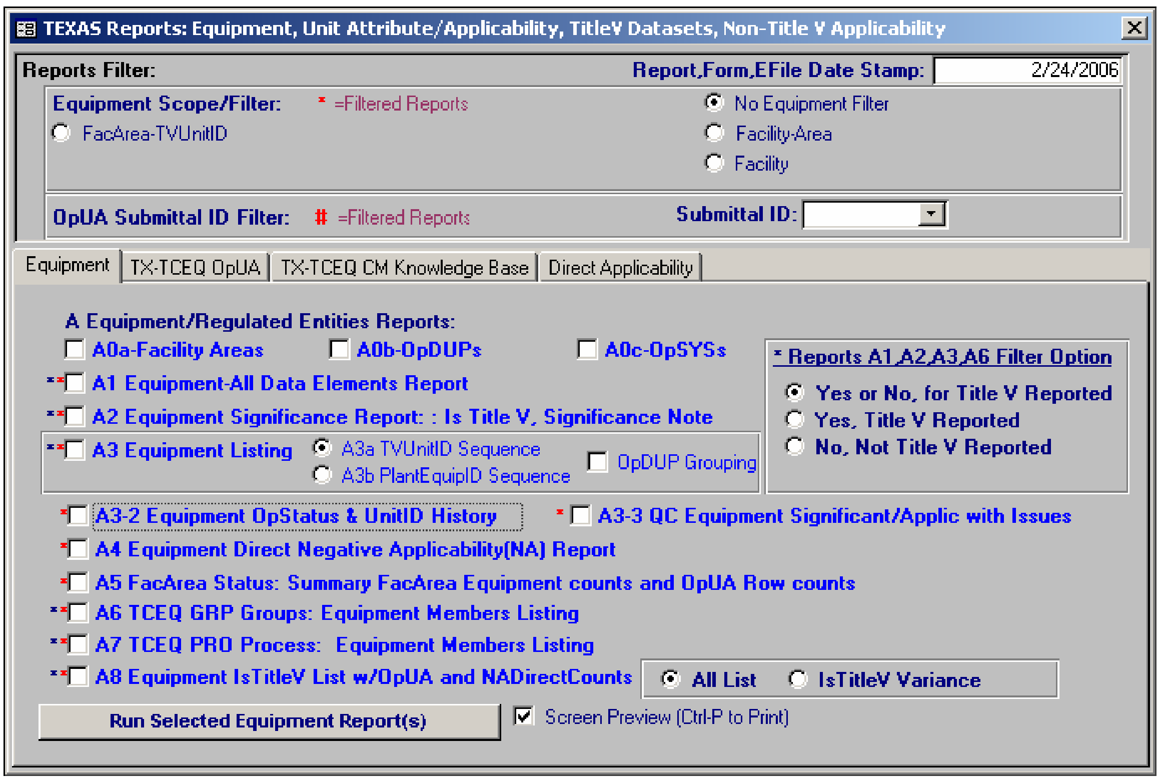
K. Permit & Applicability Reports

The Reports form for Permit & Applicability is opened following selection at the IntelliRegs menu bar of ***Reports: Mgmt & Title V*** of the ***TEXAS-Permit-RegOps*** menu selection. Reports are offered in four groupings presented within tab sections of the report selection window:

1.) Equipment: Facility Equipment Reports
2.) TX-TCEQ OpUA: Unit Attribute and Applicability Management Reports
3.) TX-TCEQ CM Knowledge Base: Connected versionWizbase.mdb Reports
4.) Direct Applicability: Unit+Citation direct applicability.

The Reports Filter: Header data in the top third of the report selection window is used with all four of the tab section report operations to select/filter report output.

Each tab report group has it's own **Run Selected Reports** button. Report operations are selected and run from each tab group from the ***Reports*** screen, as shown below:

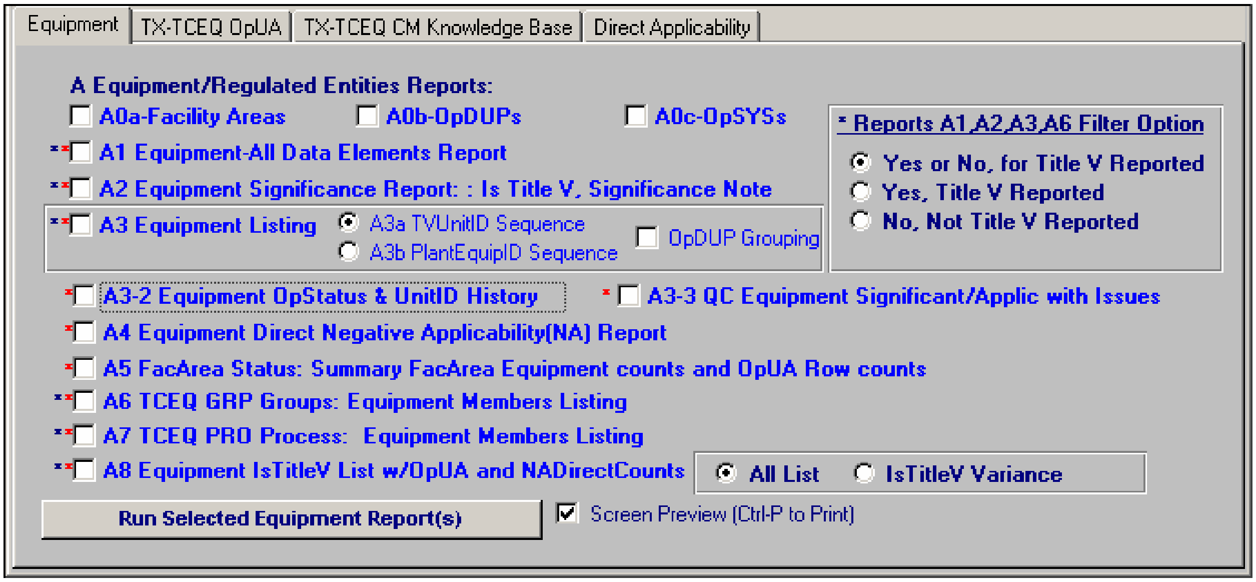


Header Selection: Select date to print on forms, equipment filter (if any), and OP-UA form submittal ID (if filter is desired and applicable to your report selection).

Tab Selection: Select the tab of the desired report grouping and check report checkboxes for reports wanted, then select the **RUN SELECTED REPORTS** button.

This User's Manual section reviews each tab report group. See User's Manual **Section 3** for example printouts of all reports.

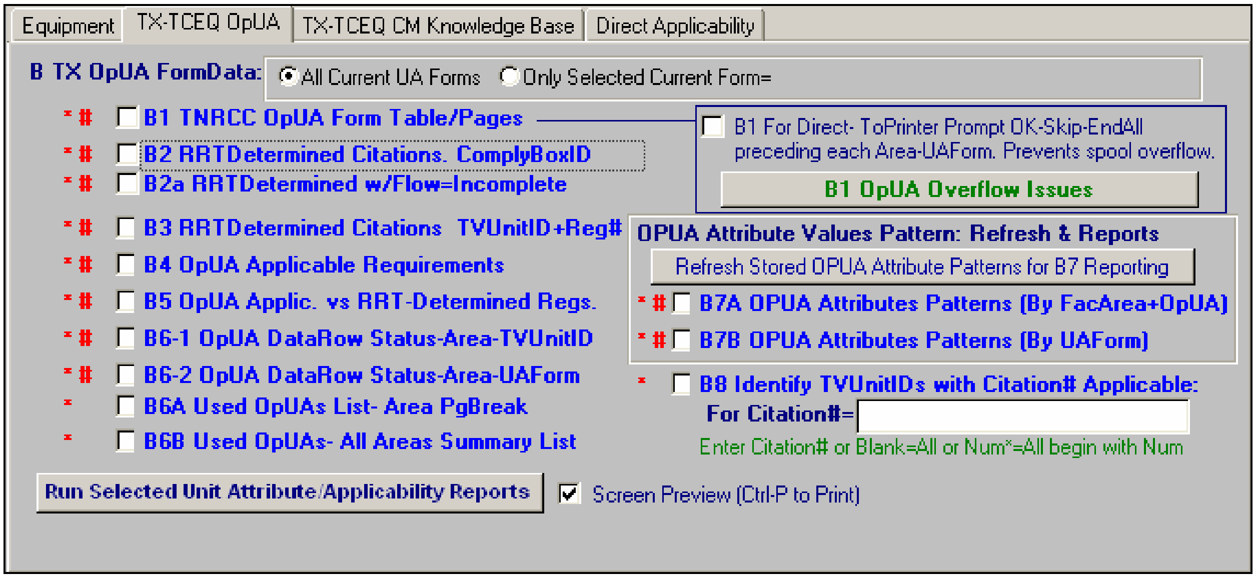
K1. Equipment Reports



Equipment Management Reports are run from the tab-screen, which appears after selection of the **Equipment** Tab.

*See printed example reports in **Section 3** for each report–A1, A2, A3, A4, A5, A6 and A7.

K2. TX OpUA Reports

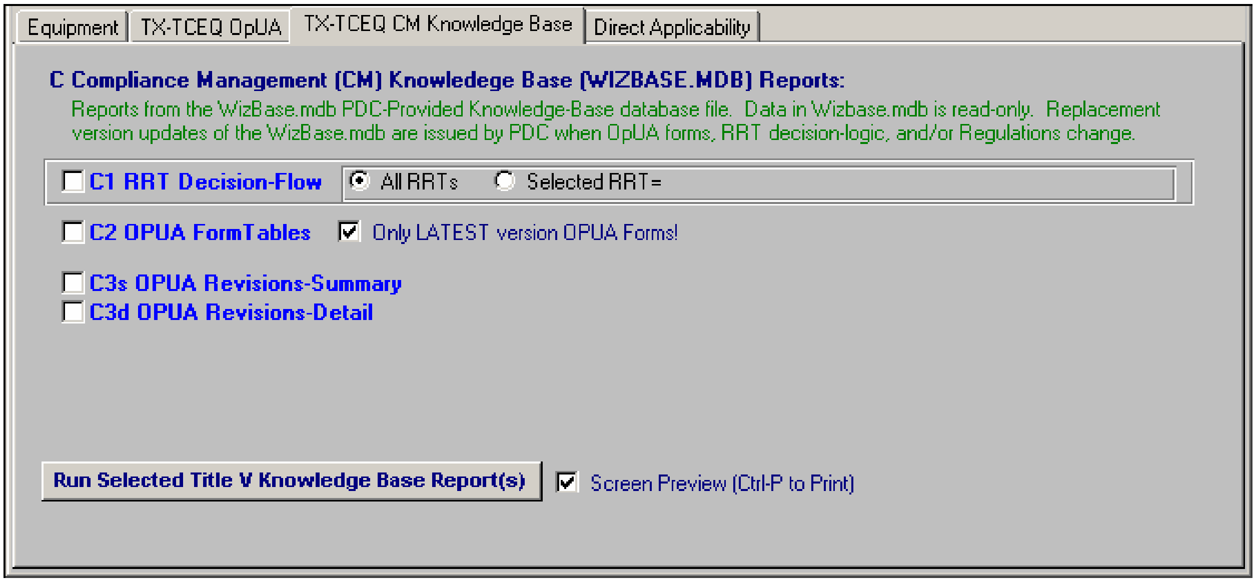


Unit Attribute and Applicability Management Reports are run from the tab-screen, which appears after selection of the **TX-TCEQ OpUA** Tab.

*See printed example reports in **Section 3** for each report–B1, B2, B3, B4, B5, B6, B6A-2, B7, and B8.

K3. CM Knowledge Base

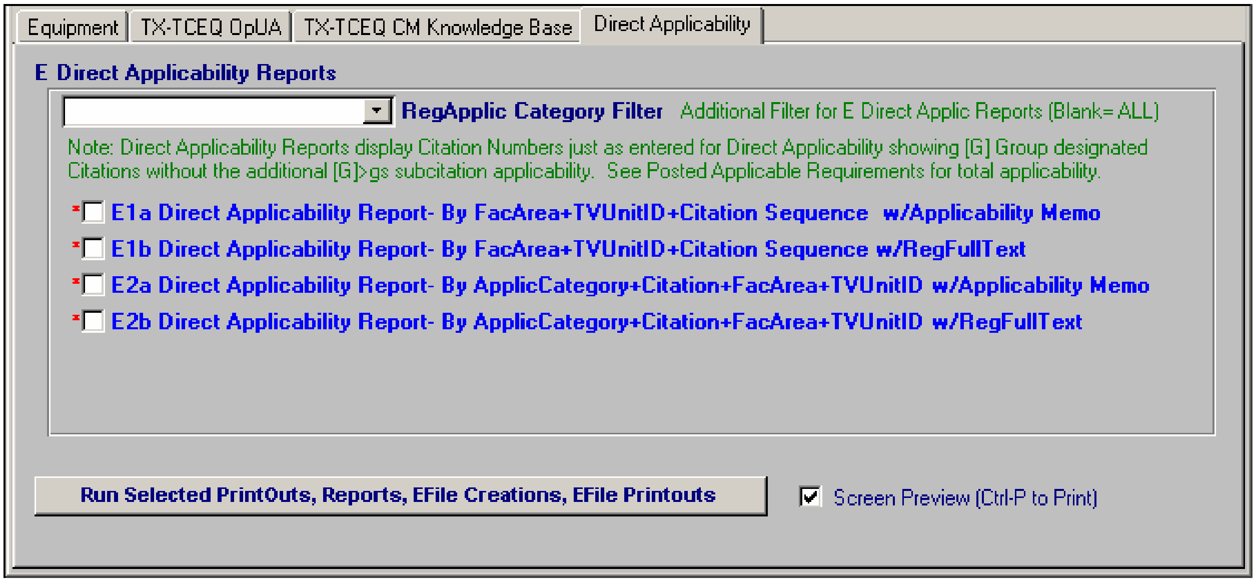
Reports on the data in the read-only, connected version of the Wizbase.mdb IntelliRegs Knowledge Base database. The Wizbase.mdb is updated and distributed by PDC whenever required to reflect TCEQ OpUA and RRT revision/update and to reflect citation renumbering and invalid=retired citation number changes.



See Menu Bar.... Help... About IntelliRegs for version date of the connected WizBase.mdb Knowledge Base file and see PDC's website to get the latest version of the Wizbase.mdb.

K4. Direct Applicability

Direct Applicability reports are run from the **Direct Applicability** tab. These may be filtered such as TV, NSR, PBR/SE, and TV Terms and Conditions. Reports may be ordered in one of four ways.



IntelliRegs User's Manual

Section 3

Permits & Applicability
Report Examples & Attachments

3.1 Permits & Applicability Reports

Single page examples of reports available in IntelliRegs.

IntelliRegs User's Manual

Section 3.1

Permits & Applicability
Report Examples & Attachments

Section Title And Contents **SectionID**

Report Examples & Attachments (Continued)

Section Title And Contents **SectionID**

IntelliRegs Permits & Applicability Reports
Reports Definition and Use/Benefits Summary

Equipment Management Reports

A1: Equipment: Detail All-Data Report

All data field values are printed for the Equipment item, one equipment item per page.
To display all data values!

A2: Equipment Significance Listing Report

List format with key description and classification data plus complete description and significance notes printout.

Convenient documentation of Non-Title V significance justification note and equipment description.

A3: Equipment List–Summary Data Report

One data row per equipment item with summary name, classification, and identification data values.

A4: Equipment OP-REQ2 Data Report

Printout of any OP-REQ2 data entered directly for an equipment item.
(Not reference to an OP-UA Form data row!)

A5: Equipment Facility–Area Status Summary Report

Summary one-row per Facility–Area shows equipment count, number Title V Reportable, and current number of OP-UA data rows entered.

IntelliRegs Permits & Applicability Reports
Reports Definition and Use/Benefits Summary

Unit Attribute and Applicability Management Reports

B1: TCEQ OP-UA Form Table/Pages Printout

TCEQ format OP-UA Forms. Acceptable for submittal with Title V Application. (Should match TV1 Data!)

B2: RRT Determined Citations–ComplyBoxID

Documents the Citations determined by TCEQ RRT logic based upon OP-UA Form data values. With logic decision flow and grouped by Citation Block ID.

> **Note**: Refer to the C1: RRT Decision Flow Report for the particular RRT to review the decision= Yes or No.

B3: RRT Determined Citations–TV UnitID + Reg#

Documents the Citations determined by TCEQ RRT logic based upon OP-UA Form data values. In citation number order.

> **Note**: Refer to the D1: RRT Decision Flow Report for the particular RRT to review the decision= Yes or No.

B4: OpUA Applicable Requirements

This report documents the UA Applicable Requirements which are the "Special Regs" entered at the IntelliRegs OpUA for data entry screens. Note that the IntelliRegs OpUA rows are uniquely identified by a FormDataRow (FDNo) number that is program assigned and appears in the report.

All rows in the OpUA form's Special Regs are represented in the UA Applicable Requirements which are generated into TCEQ Dataset OpREQ3 Applicable Requirements or in some cases Negative Applicables into OpREQ2 Permit Shield records.

> **Note**: Prior to Spring 2006, the IntelliRegs program used Special Regs with adjustment codes such as No-Yes, Yes-No, No-No to act like "debit and credits" to the RRT-Determined requirements resulting in "NET-Applicable Requirements". Effective Spring 2006, with Version 7B, the UA Applicable Requirements (Special Regs) are independent from the TCEQ RRT-Determined requirements. Comparison is available in OpUA report B5.

B5: OpUA Applic. vs RRT-Determined Regs

This report displays both the UA Applicable Requirements (as entered as Special Regulations) and the TCEQ RRT-Determined requirements based on the entered UA attribute values. This enables a comparison to be made to confirm any differences or on which to direct reviews and/or adjustments of the UA Applicable Requirements based on the TCEQ RRT-Determined regulations.

Note: Effective Spring 2006 with Version 7B the RRT-Determined and Special Regulations are independent.

B6: OP-UA Status Report: By FacArea-UnitID or FacArea-OP-UA Form

This report summarizes the OP-UA form data entry status.

Two sort/group versions of this report may be selected, either grouped by UnitID or grouped by each OP-UA Form.

Grouping by UnitID assists status review for each UnitID to determine whether all appropriate forms for each equipment item have been entered. Grouping by OP-UA Form presents data in the sequence as it will appear in the printed OP-UA3 forms as printed with the C4 report selection.

C1: Mgmt/Analysis: RRT Decision Flow Report

This report documents the RRT decision rules in the IntelliRegs Knowledge Base. Reference this report to review RRT-Determined Yes/No flow and determined citation blocks and citations. Reference the actual TCEQ flowcharts for diagram views of these rules. During use of the IntelliRegs program this RRT Decision Flow can be reviewed for each form. The program form entry screen also displays the data element formula for each RRT decision.

IntelliRegs Permits & Applicability Reports
Reports Definition and Use/Benefits Summary

Title V Application Forms And EFiles Outputs

TV1: OP-UA EFile Source Data Report

EFiles for OP-UA are created from OP-UA Dataset created, edited, and added-to at the IntelliRegs reports, Title V operations. Report TV1 shows the EFile source dataset. Adds and edits made by a user to the EFile dataset are not reflected in IntelliRegs OP-UA data (Printed in Report B1) and should be limited to entry of Non-IntelliRegs OP-UA Form data or for manual edits which "override" IntelliRegs's automatic OP-UA data generation. See TV5 for a printed report of the OP-UA Electronic File data.

TV2: TCEQ OP-SUM Form

TCEQ format OP-SUM form. Acceptable for submittal with Title V Permit Application in accordance with the latest TCEQ specifications and instructions. See TV5 for a printed report of the Electronic File report of OP-SUM data.

TV3: TCEQ OP-REQ2 Form

TCEQ format OP-REQ2 form. Acceptable for submittal with Title V Permit Application in accordance with the latest TCEQ specifications and instructions. See TV5 for a printed report of the Electronic File report of OP-REQ2 data.

TV4: TCEQ OP-REQ3 Form

TCEQ format OP-REQ3 form. Use Option B (Page 1 and Page 2) if submitting paper form (without Electronic data) to the TCEQ, which has been accepted by TCEQ for submittal with Title V Permit Application. See TV5 for a printed report of the Electronic File report of OP-REQ3 Data.

TV5: Printout of IntelliRegs Created TCEQ Submittal Electronic Files Contents

Note: This output is only available simultaneous to the creation of the electronic file generated from the same data used to create the EFile!

Reports for OP-SUM, OP-UA, OP-REQ2, and OP-REQ3 are similar in format. By displaying a black rectangle at the beginning of each EFile row, this report better identifies actual data in "ASCII rows" which may not be easily defined in a direct printout of the ASCII file.

IntelliRegs Permits & Applicability Reports
Reports Definition and Use/Benefits Summary

Special and Utilities Reports

SR1: TV Special-Regs Fast: Special-Regs List

This report lists all Special-Regs in TVUnitID+FD#-SOP+Citation#+ReqType sequence. All fields of the Special Regs data are printed out grouped by FD# sections. The entire Special Note will be printed as the report cell expands if required. This report is generated from the TV Special-Regs Fast operation- selection of the LIST/REPORT command button. (See User's Manual Section 2: H TV Special-Regs-Fast.)

UT1: Utilities: Prior (Superceded) To Current (Revision) Migrates

This report identifies OP-UA data rows that have been auto-migrated from a prior=superceded version of the OP-UA form to a revised=current version. The FDNo for the old and new OP-UA data rows is displayed on the report with Data Processing Confidence % and the Add,Delete,Shift Attribute Counts. If an SOP Index# was assigned to the old OP-UA data row, it is displayed on the report (Old and New have same SOP Index No!).

UT2: Utilities: RRT Decision Flow Update Action Log Report

This report prints out the contents of the Utility:RRT Decision Flow Updates Log. Entries are made into this log when the RRT Decision Flow Update is run and a different RRT Decision Flow is determined from the existing/prior RRT Decision Flow. This identifies changes in RRT flow after installation of updated Knowledge Bases, WizBase.mdb.

IE1: Import/Export: Preview of Last TaskTrakker Export Data Report

This report shows the Regulatory Applicability data of the last export to the TaskTrakker database. It lists equipment type, source type, unit source type, rule type, citation source type, and PreReg blocks showing grouping of citations.

IntelliRegs User's Manual Sections 4 & 5:

Unified Operations

This section of the IntelliRegs User's Manual provides instructions for Unified Operations.

The Unified Operations functions within IntelliRegs enable revisions using Update/Revise functions that reflect the latest version Permits/Applicability and Regulations/TaskDefinitions data.

Please also see **Section 5** of this User's Manual for Unified Operations report examples.

IntelliRegs User's Manual

Section 4

Unified Operations

Paragraph and Title **Page**

A. Introduction to Unified Operations

What are Unified Ops and how are they used?

Unified Operations (Unified-Ops) contain the linking/merging of data from the IntelliRegs **Permits and Applicability Area** and the **Regulations/Task Definitions Area**. Data is not added, edited, or deleted at data-entry forms but rather is revised using Update/Revise functions that reflect the latest version Permits/Applicability and Regulations/TaskDefinitions data into the unified data tables.

Unified-Operations are selected from the IntelliRegs menu bar... ***Unified-Ops.....***

There are two *Unified-Ops* menu items:

1. *Posted Applicable Requirements*

   Also referred to as "PAR" this is the Unit+Citation+RequirementType as updated based on both the Permit Direct-Applicability and State-Specific Applicability. This section of the user manual provides information on PAR operations.

2. *Unit-Applicable RegTasks*

   The merge of PAR Unit-Applicability and IntelliRegs Task Definitions.

   Note: In development 2006 by PDC. Documentation will be in this section of the user manual when this feature is implemented.

B. Posted Applicable Requirements

<u>What are "Posted Applicable Requirements" and how are they used?</u>

Posted Applicable Requirements represent the Facility-Equipment and Citation-Number associations/links that identify required regulations.

Posted Applicable Requirements are used to:

1.) Merge Title V and Direct-Applicable Requirements into a single "unified" applicability data table. Provide for create and/or refresh for all-equipment, selected equipment, or only for equipment with changed applicability since the last update/refresh.

IntelliRegs provides for establishing "Title V Applicability" which utilizes TCEQ Unit Attribute forms (OpUA) to identify equipment attributes and then associate citations and requirement types for that equipment based on those attributes. This applicability is reported in IntelliRegs for OpUA data in management reports and is used to create DataSets which are formatted as TCEQ OpREQ3-Applicability and TCEQ Op-REQ2-Negative Applicability. (See User's Manual: Equipment Inventory and Unit Attribute (UA Data: Rules and Form Data)).

IntelliRegs also provides for establishing "Direct Applicability" where regulation numbers are associated directly to equipment/regulated entities. This applicability is not reported within the TCEQ OpREQ3 or OpREQ2 forms.

Note: In prior IntelliRegs versions this may have been referred to as "NonTitleV Applicability".

Direct Applicability is used to identify any type of applicability that is not Texas/TCEQ reported on the OpREQ3 or OpREQ2 forms such as for any other State's requirements, for TCEQ NSR, PBR, SE or other permit requirements, and to add definitive citation requirements applicability to implement general compliance wording. (See User's Manual: **Direct Applicability**)

Posted Applicable Requirements are created and/or refreshed by IntelliRegs from the Title V Applicability and Direct Applicability data and are not directly able to be added, edited, or deleted by the user.

2.) Expand [G]=Citation-Group applicability to add sub-citations appropriate for the [G] Group designated Citation Number.

IntelliRegs enables an applicable regulation to be identified as a "Citation Group-Applicability" by use of the [G]=Group symbol at the Equipment-Citation-Type-[G]. (See User's Manual: Direct Applicability and Special Requirements for additional instructions on data entry of [G]).

Whether used in Title V Applicability or in Direct Applicability, the meaning of the [G] Group with an applicable requirement is the same indicating that the identified citation number and all sub-ordinate citation numbers for the citation are applicable. Use of the [G] enables "blocks" of applicable citations to be more efficiently entered and reviewed during assignment of requirements to equipment/entities.

When Posted Applicable Requirements are created from the Title V and/or Direct Applicable Requirements, all [G] citations are posted then all of the sub-citations are posted. The result is a definitive, by citation number applicable requirements.

3.) Provide for Quality Analysis and management reports of applicability versus IntelliRegs Citation FullText and Task-Definitions to ensure complete and accurate identify and assignment of requirements.

After Posted Applicable Requirements have been created or refreshed, then a number of Quality Analysis reviews and management reports can be run. Quality Analysis reviews identify missing, incorrect, or "suspicious" data suggesting correction or review and confirmation of the identified data.

One of the valuable Quality Analysis reports identifies if any Citation RegText and/or Task Definitions are required in IntelliRegs for applicable citations.

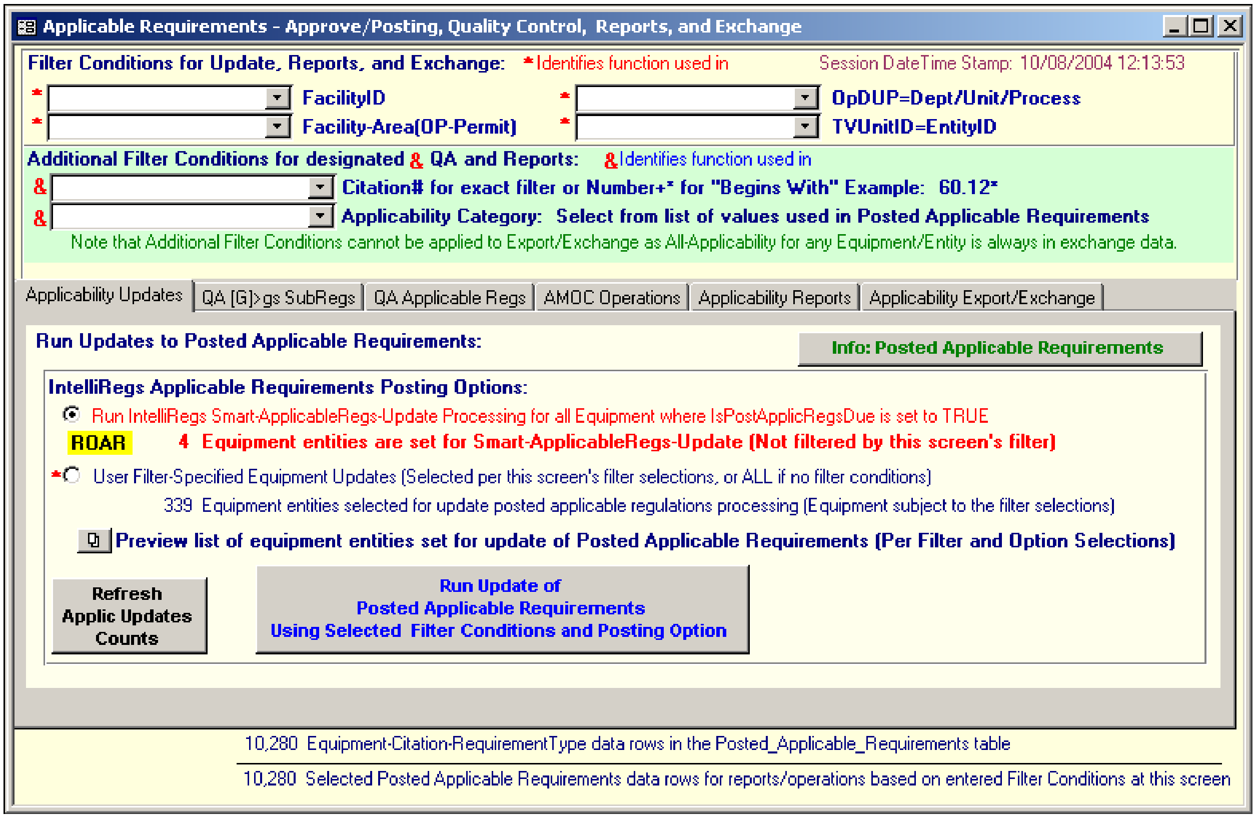
4.) Provide for the export of Applicable Requirements into an exchange file that can be imported/processed by Compliance Management Systems.

The Compliance Management System applicability export/exchange file is created containing all Title V and Direct Applicable requirements and can be selected to exchange all data in the Posted Applicable Requirements table, or optionally for a specified Area, Department, and/or TVUnitID condition. The exchange can also be selected to export only for equipment where applicability has changed since the last export/exchange.

The Posted Applicable Requirements screen is selected from the IntelliRegs menu bar... ***Unified-Ops***>>***Posted Applicable Requirements*** and provides for creation, refresh, quality review, reports, and exports of the Posted Applicable Requirements. Several tabs provide for different operations/data views and are reviewed in this section of the User's Guide.

B1. Posted Applicable Requirements: Form Header/Footer

The *Posted Applicable Requirements* screen consists of a header/footer display and several tab-views for particular operations/functions. The header/footer is viewable during use of any of the tab-views. Instructions and information for each tab-views' operations are provided following this Header/Footer discussion.



Filters for Posted Applicable Requirement operations are specified by selection of a value from a dropdown or keypad entry of values into the conditions fields.
The filter condition fields are:

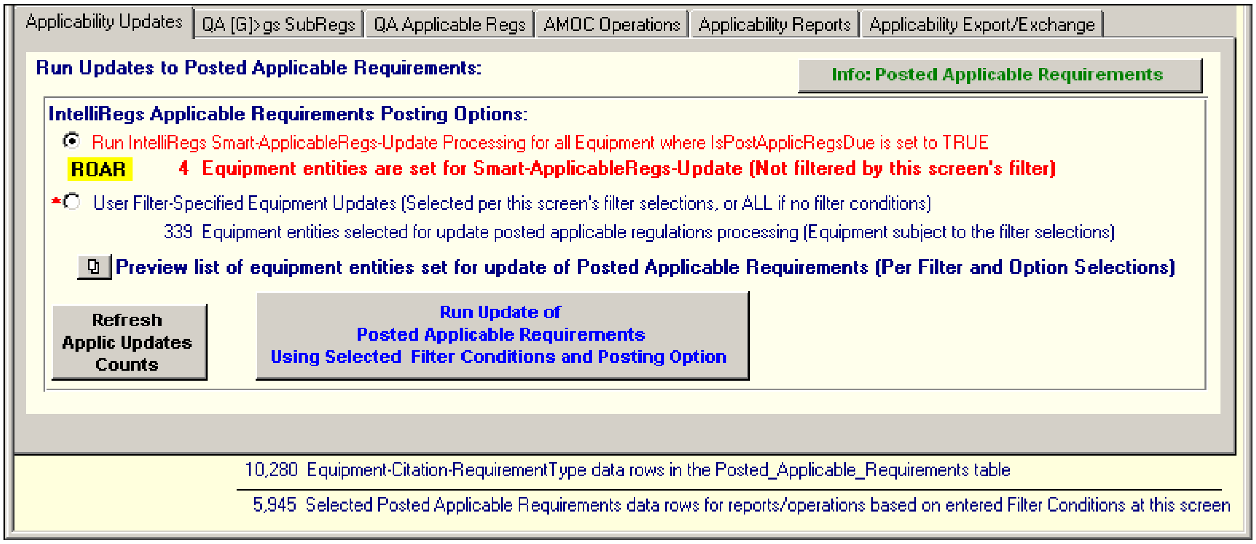
Filter Conditions for Updates, Reports, and Exchanges as designated by **red** asterisks *
- **Facility ID** <Blank>=all or select from pick-list
- **Facility Area** <Blank>=all or select from pick-list
- **OpDUP=Department/Process** <Blank>=all or select from pick-list
- **TVUnitID=Entity** <Blank>=all or select from pick-list

Additional Filter Conditions for operations designated by the **red** and sign **&**
- **Citation#** <Blank>=all or select from pick-list or enter number+asterisks for "Like #"
- **Applicability Category** <Blank>=all or select from pick-list

Current total counts and counts selected for the current filter conditions are always displayed at the footer area of the Posted Applicable Requirements screen. These counts are revised whenever the data is create/refreshed or the filter condition is revised.

B2. Posted Applicable Requirements: Applicability Updates Operations

Creation of new Posted Applicable Requirements and updates/refresh of the applicability data is run from the Applicability Updates tab selections. The screen is shown below:

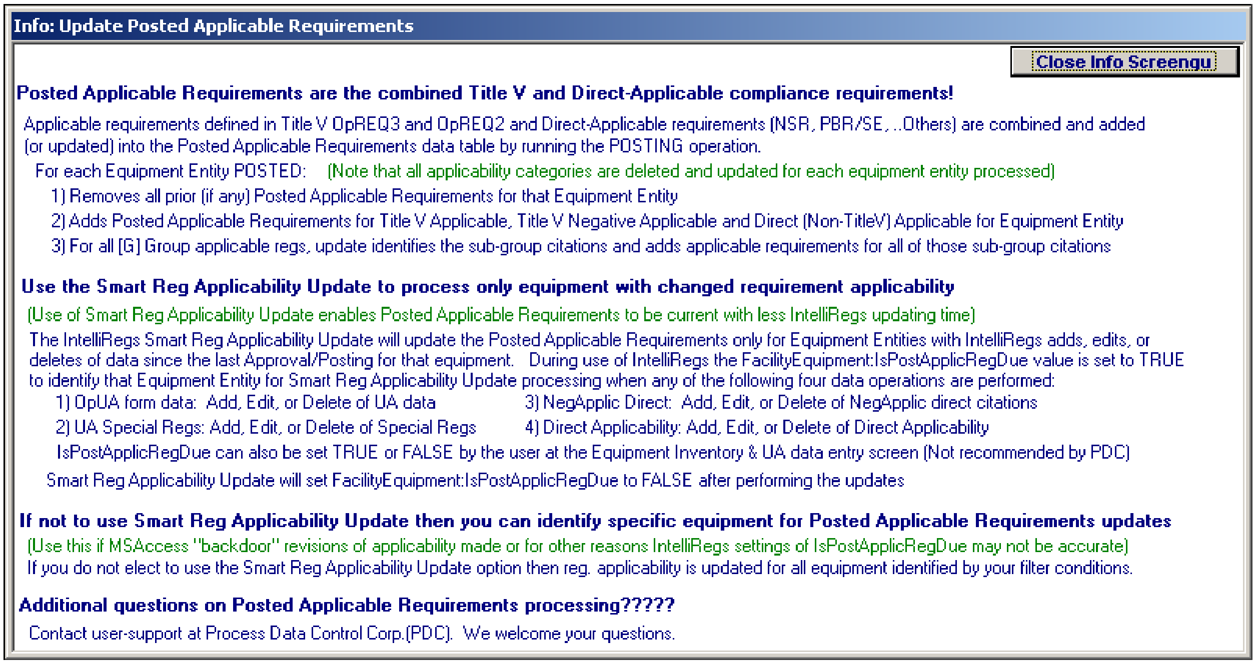


In the example screen 4 equipment/regulated entities are set for update/refresh. If this option is run, then the Posted Applicable Data is completely updated for all of the selected equipment items.

A list of the equipment entities selected for updates can be reviewed by clicking the **Preview list of**... button. The Refresh Applic Updates Counts button can be run if the counts do not appear to correctly reflect refresh and/or filter changes.

The updated=current Posted Applicable Requirements data is reviewed, reported, and exported using the functions on the other screen tabs.

Click the **Info: Posted Applicable Requirements** button for help during use of the Posted Applicable Requirements: Applicability Updates screen as shown in the following figure:


Info: Update Posted Applicable Requirements

Close Info Screengu

Posted Applicable Requirements are the combined Title V and Direct-Applicable compliance requirements!

Applicable requirements defined in Title V OpREQ3 and OpREQ2 and Direct-Applicable requirements (NSR, PBR/SE, ..Others) are combined and added (or updated) into the Posted Applicable Requirements data table by running the POSTING operation.

For each Equipment Entity POSTED: (Note that all applicability categories are deleted and updated for each equipment entity processed)

1) Removes all prior (if any) Posted Applicable Requirements for that Equipment Entity
2) Adds Posted Applicable Requirements for Title V Applicable, Title V Negative Applicable and Direct (Non-TitleV) Applicable for Equipment Entity
3) For all [G] Group applicable regs, update identifies the sub-group citations and adds applicable requirements for all of those sub-group citations

Use the Smart Reg Applicability Update to process only equipment with changed requirement applicability

(Use of Smart Reg Applicability Update enables Posted Applicable Requirements to be current with less IntelliRegs updating time)

The IntelliRegs Smart Reg Applicability Update will update the Posted Applicable Requirements only for Equipment Entities with IntelliRegs adds, edits, or deletes of data since the last Approval/Posting for that equipment. During use of IntelliRegs the FacilityEquipment:IsPostApplicRegDue value is set to TRUE to identify that Equipment Entity for Smart Reg Applicability Update processing when any of the following four data operations are performed:

1) OpUA form data: Add, Edit, or Delete of UA data
2) UA Special Regs: Add, Edit, or Delete of Special Regs
3) NegApplic Direct: Add, Edit, or Delete of NegApplic direct citations
4) Direct Applicability: Add, Edit, or Delete of Direct Applicability

IsPostApplicRegDue can also be set TRUE or FALSE by the user at the Equipment Inventory & UA data entry screen (Not recommended by PDC)

Smart Reg Applicability Update will set FacilityEquipment:IsPostApplicRegDue to FALSE after performing the updates

If not to use Smart Reg Applicability Update then you can identify specific equipment for Posted Applicable Requirements updates

(Use this if MSAccess "backdoor" revisions of applicability made or for other reasons IntelliRegs settings of IsPostApplicRegDue may not be accurate)

If you do not elect to use the Smart Reg Applicability Update option then reg. applicability is updated for all equipment identified by your filter conditions.

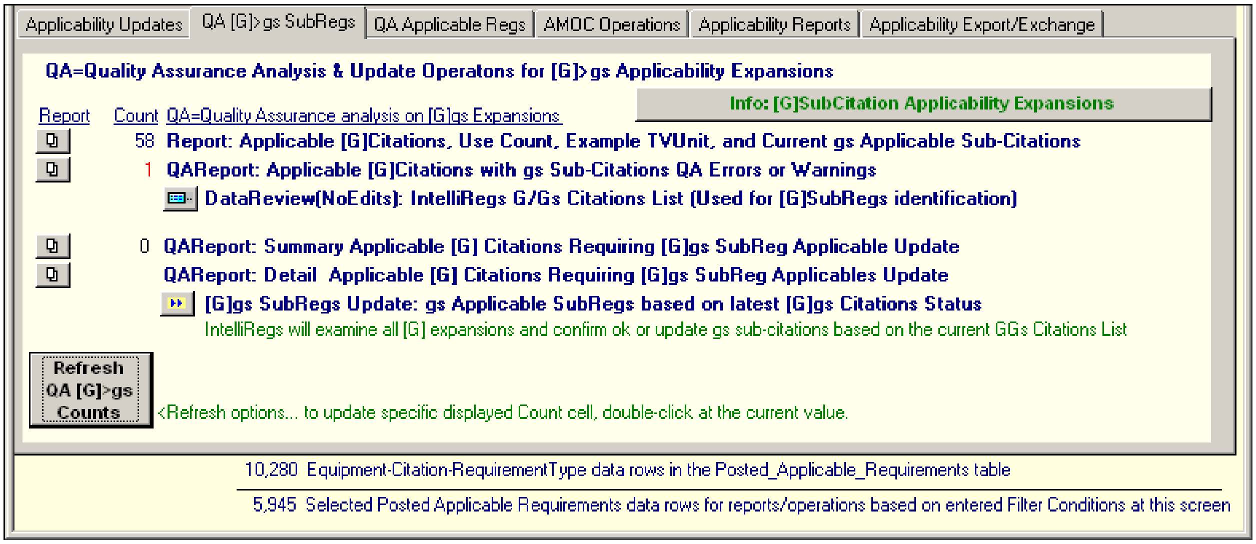
Additional questions on Posted Applicable Requirements processing?????

Contact user-support at Process Data Control Corp.(PDC). We welcome your questions.

The ***Info: Posted Applicable Requirements*** help window is available for review during use of the IntelliRegs program.

B3. Posted Applicable Requirements: QA [G] gs SubRegs

Creation or update/refresh of Posted Applicable Requirements includes adding applicability for all sub-citations for applicability with the [G] Group designation. These "expansions" may be reviewed and Quality Analysis of those sub-citations run at the QA [G] gs SubRegs operations. The screen is shown below:



The example screen shows counts for QA on all Posted Applicable Data (No Filter Conditions) indicating that there are 58 unique citations where the [G] Group applicability option has been used. Of these 58 the QA finds 1 where review, correction, or confirmation is suggested. Reports can be previewed (and optionally printed) of these reviews.

IntelliRegs can recognize if the G>gs SubRegs expansion in the Posted Applicable Requirements table represents the latest list of citations that should be identified. If changes in citation identification lists have been made that invalidate the expansions/sub citations identified then a count > 0 will be displayed in red on the form.

Note that the counts initially appear as question marks **?** and can be displayed by double-clicking a particular question mark or by clicking the **Refresh QA Applic Regs Counts** button.

Note: During use of IntelliRegs you can select the **Info: [G]SubCitation Applicability Expansions** button for help information. That screen is shown on the following page.

Info: Posted Applicable Requirements [G]>gs QA Operations

Close Info Screenqu

IntelliRegs Title V or Direct Applicability can optionally designate an applicable Citation as "Citation-Group-Applicable" by entering a [G] into the Group/PreBlock field. This data entry is done for Title V data at the Special Regs screen for a particular OpUA form and for Direct Applicables at the Direct-Applicability data entry screen.

It is necessary to define all applicable sub-citations for applicability where the [G]=GroupApplicability option has been used.

Note: Although the "shorthand" notation with [G] provides acceptable definition of citation "blocks" for permitting and/or Direct Applicability designation the compliance management system must have all citations definitively identified in order to review all regulation text and tasks.

The Posted Applicable Requirements [G]>gs Quality Analysis reviews the completeness of sub-citation identification.

Note: All sub-citations are to be complied with for [G]-designated applicability. It is therefore important to ensure that the list of subcitations is complete and accurate in order to ensure that all appropriate citations have been identifed for compliance.

If IntelliRegs finds [G}>gs Sub-Citation data that indicates and error, an omission, or confirmation is suggested then a count (not 0) is displayed indicating the number of "[G]>gs Issues" for suggested review and resolution.

Note: If the count displays a question-mark then double-click the question mark to have IntelliRegs perform the analysis and display the findings count. Optiionally to refresh all of the [G]>gs counts click the Refresh QA[G]>gs Counts button.

Select/Click Report buttons for preview and/or printout of [G]gs Reports

Note: The detailed Citation numbers for all QA [G]>gs counts can be reviewed by selecting the report button. If the count has a question ? displayed when the report is selected then the question mark will be replaced with the count before proceeding to run the report.

Regarding...........Applicable [G] Citations requiring [G]gs SubReg Applicable Updates...

Note: If the list of Sub-Citations for a [G]Citation is changed (Added Citation-FullText records or an updated WizBase-KnowledgeBase from PDC) then the current Posted Applicable Requirements [G]>gs citations will be found to be invalid. If any of these "mismatches" are identified then run the [G]>gs update and the correct sub-citations will be identified for all invalid expansions.

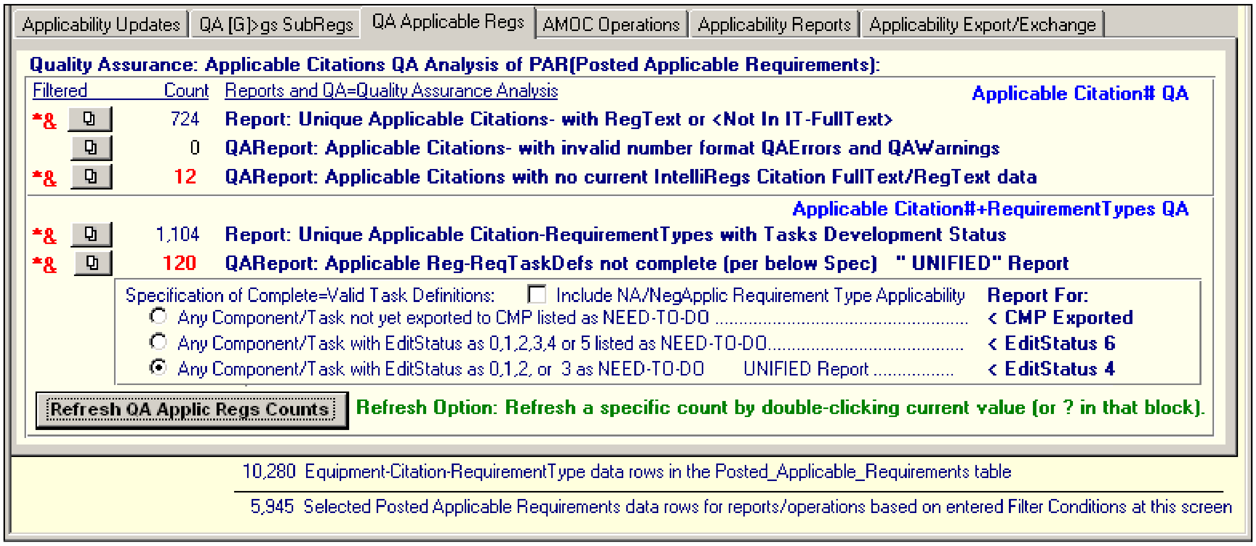
It is recommended that all errors and warnings identified by the QA [G]>gs functions be reviewed and corrected or confirmed correct as is before using the applicability data in your Compliance Management system.

Additional questions on [G]>gs Quality Analysis and Corrections?????

Contact user-support at Process Data Control Corp.(PDC). We welcome your questions.

B4. Posted Applicable Requirements: QA Applicable Regs

A Quality Analysis (QA) is provided by IntelliRegs for the Posted Applicable Requirements. An example of the QA Applicable Regs operations screen is shown below.



In this example all of the Posted Application Requirements are analyzed (No filter conditions). Counts of the findings are displayed showing 724 unique Citation Numbers have been identified as applicable, there are 0 numbers that do not satisfy numbering specifications, and 12 of the unique applicable Citations do not yet have IntelliRegs Citation FullText data.

Note that the counts initially appear as question marks **?** and can be displayed by double-clicking a particular question mark or by clicking the **Refresh QA Applic Regs Counts** button.

If a count is greater than zero (0), then you can preview and optionally print a report of the data by selecting the appropriate report button.

When Citation Regulation Text (FullText) and Base/Generic Task Definitions (By Citation+Requirement-Type i.e. 63.112(a) MN=Monitoring) is in IntelliRegs for all Posted Applicable Requirements, then the QAReport counts will be 0. A list of needed Citation-FullText and/or Task Definitions can be previewed and optionally printed by selecting the appropriate report button.

B5. Posted Applicable Requirements: AMOC Applicability Management of Change

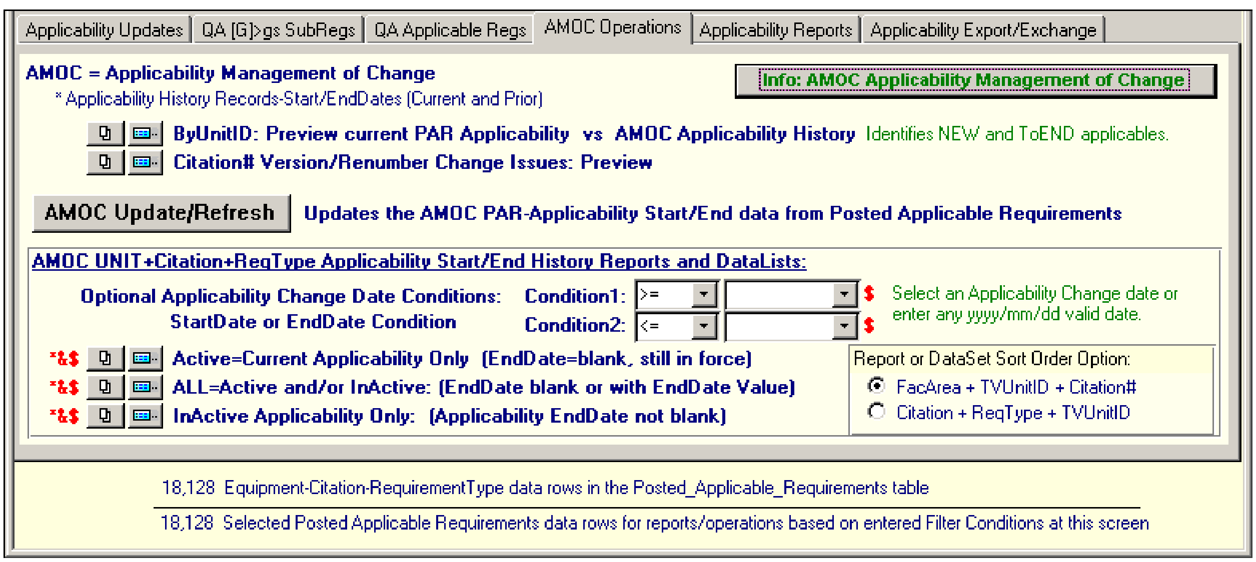
Applicability Management of Change (AMOC) is documented by IntelliRegs with data in the PAR_ApplicStartDate table. This table contains accumulative, historical, data including the StartDate, EndDate of Unit+Citation+RequirementType applicability.

Applicability Management of Change (AMOC) data is important to:

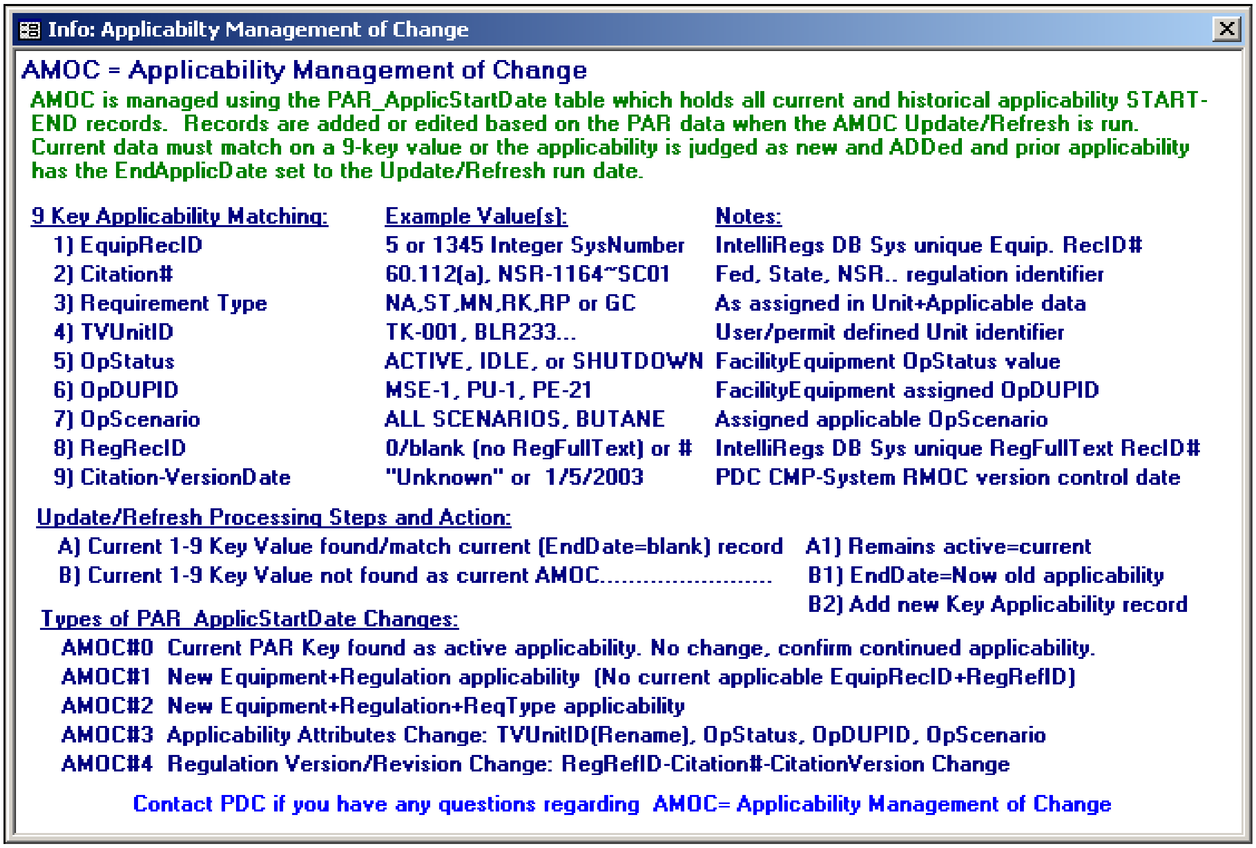
1. Identify the StartDate of Unit+Citation+RequirementType applicability
2. Document the EndDate of applicability
3. Document applicability based on nine (9) elements recognizing:
   * New Unit+Citation+RequirementType (base applicabilility)
   * Renamed UnitID but same Citation+RequirementType
   * Unit change of OpStatus, OpScenario, and/or OpDUPID (Department)
   * Citation version revision or renumbering.

AMOC data is added, confirmed current (unchanged), or applicability ended (edited) by running the AMOC Update/ Refresh operation. Immediately after the running the AMOC Update/Refresh the active, current applicability in the PAR_ApplicStart data will be equal the Posted Applicable Requirements current status. The AMOC Update/Refresh may be run whenever it is desired to record the latest Posted Applicable Requirements status into the PAR_ApplicStartDate AMOC table. Note that an advance preview of pending new and ending applicability may be reviewed before actually performing the update.

Applicability Management of Change (AMOC) processing and reports are run at the AMOC Operations tab in the Posted Applicable Requirements screen.



The Info: AMOC Applicability Management of Change command button provides online message box information on the AMOC processing as shown.


Info: Applicabilty Management of Change

AMOC = Applicability Management of Change

AMOC is managed using the PAR_ApplicStartDate table which holds all current and historical applicability START-END records. Records are added or edited based on the PAR data when the AMOC Update/Refresh is run. Current data must match on a 9-key value or the applicability is judged as new and ADDed and prior applicability has the EndApplicDate set to the Update/Refresh run date.

9 Key Applicability Matching:	Example Value(s):	Notes:
1) EquipRecID	5 or 1345 Integer SysNumber	IntelliRegs DB Sys unique Equip. RecID#
2) Citation#	60.112(a), NSR-1164~SC01	Fed, State, NSR.. regulation identifier
3) Requirement Type	NA,ST,MN,RK,RP or GC	As assigned in Unit+Applicable data
4) TVUnitID	TK-001, BLR233...	User/permit defined Unit identifier
5) OpStatus	ACTIVE, IDLE, or SHUTDOWN	FacilityEquipment OpStatus value
6) OpDUPID	MSE-1, PU-1, PE-21	FacilityEquipment assigned OpDUPID
7) OpScenario	ALL SCENARIOS, BUTANE	Assigned applicable OpScenario
8) RegRecID	0/blank (no RegFullText) or #	IntelliRegs DB Sys unique RegFullText RecID#
9) Citation-VersionDate	"Unknown" or 1/5/2003	PDC CMP-System RMOC version control date

Update/Refresh Processing Steps and Action:

A) Current 1-9 Key Value found/match current (EndDate=blank) record — A1) Remains active=current

B) Current 1-9 Key Value not found as current AMOC........................ — B1) EndDate=Now old applicability; B2) Add new Key Applicability record

Types of PAR_ApplicStartDate Changes:

AMOC#0 Current PAR Key found as active applicability. No change, confirm continued applicability.

AMOC#1 New Equipment+Regulation applicability (No current applicable EquipRecID+RegRefID)

AMOC#2 New Equipment+Regulation+ReqType applicability

AMOC#3 Applicability Attributes Change: TVUnitID(Rename), OpStatus, OpDUPID, OpScenario

AMOC#4 Regulation Version/Revision Change: RegRefID-Citation#-CitationVersion Change

Contact PDC if you have any questions regarding AMOC= Applicability Management of Change

Preview of PAR (Current Applicability) versus AMOC Applicable Start/End=Active

In advance of running the AMOC Update/Refresh you may wish to review the pending new applicability and existing AMOC applicability identified to be "retired". Your review may identify PAR applicability that you wish to change before performing the actual AMOC Update/Refresh.

AMOC Update/Refresh: Updates the AMOC PAR-Applicability Start/End data based on the current Posted Applicable Requirements

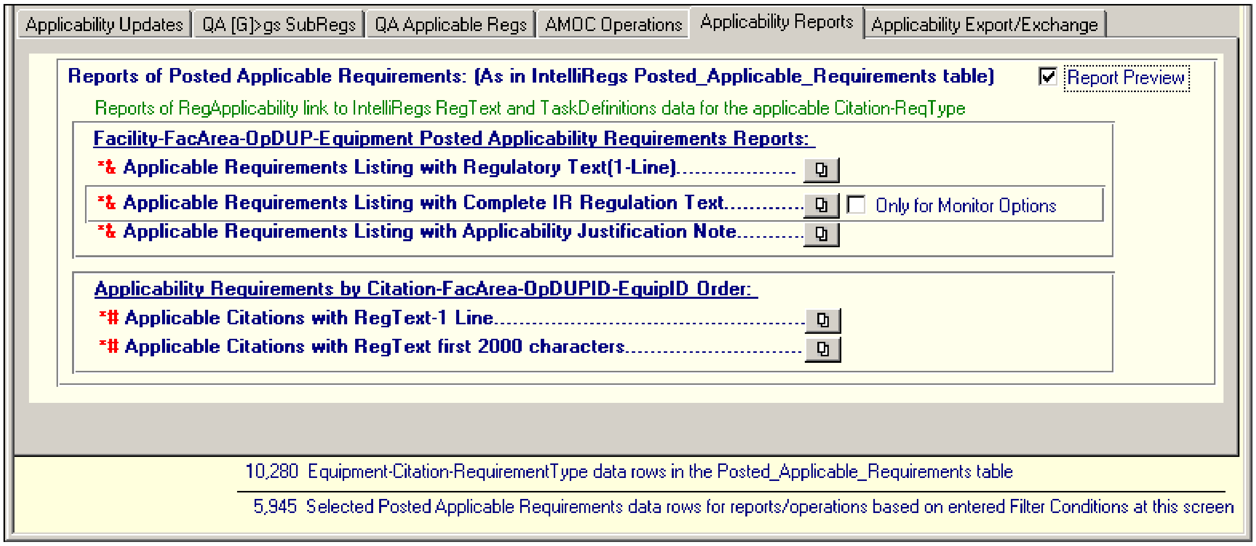
Select the AMOC Update/Refresh button to update the AMOC PAR_ApplicStartDate data to have the current PAR applicability reflected. All prior applicability that is no longer found in the PAR data will have the EndDate set to the update date. New applicability will be added with the StartDate set to the update date.

Reports and DataLists of the Applicability Management of Change (AMOC) data as stored in the PAR_ApplicStartDate table:

Reports and datalists may be selected for review of the AMOC data. The main PAR filters FacilityID, Area, OpDUP, TVUnitID, and Citation# may optionally be used to limit the selected AMOC data. In addition to the main filters you may also use optional FromDate and ToDate filters to add date conditions for the reports and datalists. Note that you can easily save datalist data by selecting File... Export... As XLS file (or other file) to perform reviews of the applicability in external programs.

B6. Posted Applicable Requirements: Applicability Reports

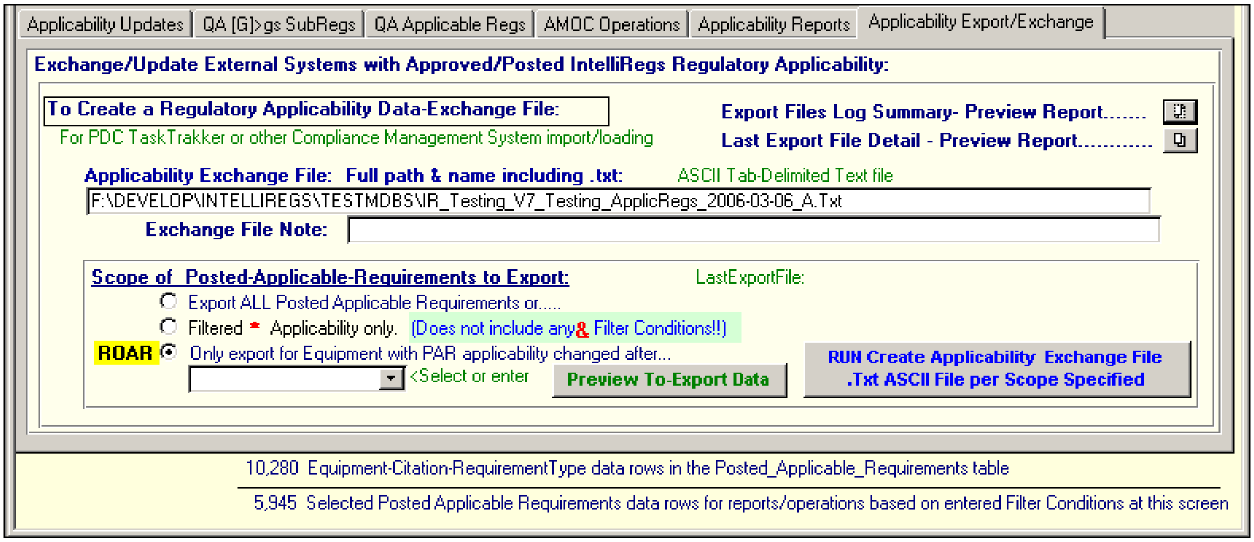
Posted Applicable Requirements reports can be previewed and optionally printed by selecting the appropriate report button. Selection of report data is based on the entered Filter Conditions. An example of the Applicability Reports screen is shown below.



Reports can be sent directly to the printer (without screen preview) by unchecking the Report Preview checkbox in the upper right of the Applicability Reports tab.

B7. Posted Applicable Requirements: Applicability Export/Exchange

An export/exchange file can be created from which your Compliance Management System can update applicability. The file is an ASCII Text file. An example of the screen from which the applicability file is specified and created is shown below.



The steps in creating an Applicability Export/Exchange file are:

1.) Complete all Quality Analysis and correct or confirm all data to be correct as is.
See the instructions and suggestions in this User's Manual for operations at the other tabs of this form. Run reports to confirm all data is ready for exchange.

2.) Identify the export file directory and name to be created.
IntelliRegs will suggest a new filename to be created in the same directory where the IntelliRegs IR.mdb facility database is located. You can change the directory location and/or the filename if desired. We suggest that you do follow the IR_<MdbName>_ApplicRegs_YYYY-MM-DD_#.Txt format which is standard for these IntelliRegs filenames.

3.) Add a Note that will be saved into the Export Log table.
A note is required... you cannot leave it blank.

4.) Select the Scope of Posted-Applicable-Requirements for export.
Designate whether to export ALL data, data filtered for your Filter Conditions, or to export only data for equipment items that have changed applicability since the last export/exchange.

5.) Optionally preview (if not all) and optionally review prior log data

6.) Click on the RUN Create Applicability Exchange File .Txt ASCII File per Scope Specified button to create the file.

IntelliRegs will read the Posted Applicability Requirements in accordance with your scope selection and filter conditions and place the selected data into the export/exchange file.

After creating the file, a record will be inserted into the Applicability Export Log table recording the date, specifications, filename, user note, and row count of the export. Any existing/prior data in the Applicability Exports Detail table will be removed and all exported applicability recorded into the detail table.

Note: The Export Log entry is retained always for review but details are only in the file for the last export/exchange. This is to conserve database space and since the actual export files can be archived and/or reports printed if desired and the data can be generated again if required there is no justification for keeping prior export details.

IntelliRegs will display a message box with the number of rows of applicability data placed into the export/exchange file.

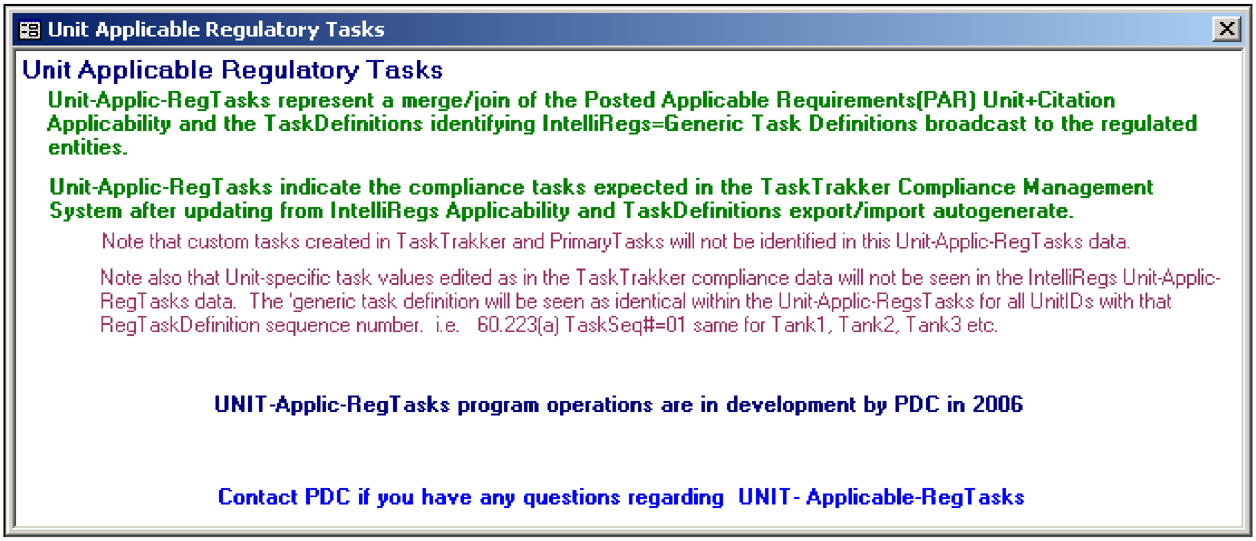
7.) Optionally review the export log summary and detail by previewing and optionally printing the Export/Exchange Log Summary and last export detail.

8.) Using your Compliance Management System, import this Applicability data by selecting the IntelliRegs Applicability Export/Exchange file.

The directory location and name of the Applicability export files is retained in your Applicability Exports log.

Note: The Applicability Export file can be imported into Excel or processed by other programs as needed. Contact PDC for file field specifications if the Applicability Export file is to be used in applications other than the Compliance Management System.

C. Unit Applicable Requirement Tasks



IntelliRegs User's Manual

Section 5

Unified Operations
Report Examples & Attachments

5.1 IntelliRegs Unified Operations Reports

Single page examples of reports available in IntelliRegs.

Task Definition Development

This section of the IntelliRegs User's Manual provides operation instructions for Task Definition Development.

The Task Definition Development functions within IntelliRegs enable efficient data processing in the creation, storage, implementation, and maintenance of compliance task definitions. The operations within this process were originally a separate application named IntelliTask.

Task Definitions become the foundational building blocks of the Compliance Management Plan. Following development in IntelliRegs, the Task Definitions are transferred into the TaskTrakker database. If applicability information from IntelliRegs Title V Permit and Applicability was also transferred into TaskTrakker, then the Task Definitions will be "broadcast" to applicable equipment to create equipment-specific tasks carrying with them all of the default, base attributes of the base Task Definition. Within TaskTrakker, the equipment-specific Task Definitions can be further edited to reflect equipment-specific attribute information.

If a rule changes, the current Task Definition can be modified to reflect those changes, and then the revised Task Definition(s) transferred to TaskTrakker for Management of Change processing.

Please also see **Section 7** of this User's Manual for Task Definition Attachments, including report examples and procedures guidance documents.

IntelliRegs User's Manual

Section 6

Task Definition Development Operation Instructions

Paragraph and Title **Page**

See **Section 7** of the IntelliRegs User's Manual for
Task Definition Development Attachments:

- Printed Report Examples
- Advanced Instructions and Procedures for Task Definition

A. Introduction to Task Definition Development

Features Summary

The Task Definition Development operations enable the Regulation Full-Text and efficient breakdown and processing of Citation or Permit text into compliance tasks. The created tasks can be exported to TaskTrakker CMP where equipment-related specific tasks are generated for the Compliance Management System. Equipment citation applicability may be determined using IntelliRegs Title V Permit and Applicability functions, and exporting the equipment-applicable citation data into TaskTrakker. Alternatively, equipment applicability and association of appropriate tasks can be performed explicitly using TaskTrakker data windows.

The Task Definition process within IntelliRegs can perform initial analysis and breakdown of iteration/permit text using the "Smart-Parse" process. This function breaks the citation full-text into one or more components, either breaking at the end of sentences or at user inserted atsign @ break points. Each component is analyzed to determine if any keywords are contained within the text. The list of keywords searched for is editable by the user prior to running Smart-Parse. For each keyword found, smart text is inserted into designated attribute field(s) as specified in the master Keywords data table.

Following Smart-Parse, you will want to review each Smart-Parse created component, determine whether that component is the basis for establishing a compliance task, and (if a task) edit each attribute value. Values such as TaskName, Frequency, Planned-Method, and Description should be revised to contain the wording you desire for tasks.

Some components created by Smart-Parse may not be appropriate to become tasks. For example, a component that says "This rule is subject to revision as appropriate by the Legislature." may not prompt a facility compliance task. For such informational components, uncheck *the Is this a Compliance Action Item?* checkbox.

Reports are available for Citation/Full-Text, Keywords, Component/Tasks, Master vs. Current IT Datafile Comparison/Change Analysis, and for SmartParse settings. (See Task Definition Report Examples in **Section 5** of this User's Manual.)

Citation text, which is in the Citation/Provision FullText data table, can be entered in several ways:

1.) Import from the Master IT Citations data tables…. (See **Import Master Data**)
2.) Import from another IT_*.Datafile…. (See **Import/Export**)
3.) Copy and paste text while running another application such as Word, Adobe PDF Reader, or textfile reader such as WordPad or NotePad.
4.) Copy and paste text from a Federal or State website.
5.) Direct data entry reading and typing from printed documents. (This is common for Permits!)

Management of Change Features

Management of Change is an important benefit of using the IntelliRegs Task Definition process. It enables prompt, efficient revisions to compliance tasks in response to changes in regulations. See the Import Master Data and Management of Change section of this User's Manual for specific instructions on use of master citations data to identify changes (if any) and importing the changed rule text.

Federal and state regulations, along with permits and other rule-establishing documents, are subject to change. When changes do occur, compliance tasks should be promptly updated, replaced, or otherwise changed to accommodate the new rules and determine what changes to compliance tasks resulted. Management of change is a four-step process:

1.) *Reconnaissance* of the activities of rule making bodies (i.e., TCEQ, EPA, OSHA, etc.) to identify when changes will be made to pertinent rules.
2.) *Assessment* of rule changes to determine the impact of such changes on compliance tasks that are currently being performed.
3.) *Re-definition* of existing compliance tasks to ensure continuous compliance with applicable rules – including new and revised rules.
4.) *Implementation* of revised tasks, and/or elimination of obsolete tasks, based on the results of the prior step.

You may perform all of these steps, modifying applicability and task definitions to conform to changes affecting your facility. The IntelliRegs program provides all required data entry interfaces to enable maintenance of applicability and task definitions. Optionally, you can participate in PDC's Regulatory Management of Change Services (RMOC), which perform much of the Reconnaissance, Assessment, and Re-definition process for multiple IntelliRegs user benefit.

IntelliRegs users may subscribe to PDC's Regulatory Management of Change Service. Every subscriber to the RMOC Service can register all or some of their regulations and permits with the RMOC Service Center in Arlington, Texas. Once a regulation or permit is registered, PDC will monitor any future updates or amendments to the rule from an approved source (generally, from the agency's web site) and provide updates for changed rules. The subscriber's Regulatory Management of Change (RMOC) process is supported at every step by this unique and fully automated procedure, as summarized below:

- *Reconnaissance*—PDC will obtain updates and amendments for all registered rules in a timely manner.

- *Assessment*—There are two level of Assessment screening:
  1.) The Comparison of amended rules to the exiting (current) rules to identify text changes (excluding punctuation and other inconsequential changes) is conducted at the Service Center using advanced RMOC systems. Subscribers receive written notification of all rule change events and the results of the Phase 1 Assessment analysis.

2.) For rule updates or amendments that are determined to be of potential importance to subscribers, Phase 2 procedures are initiated. In this phase, subscribers receive an RMOC file from the Service Center that is designed to be used by IntelliRegs to produce more detailed Assessment reports at their site. These reports identify:

   a.) ***Relevance***, i.e., text changes in specific citations within the rule relative to each subscriber's applicable citations; and

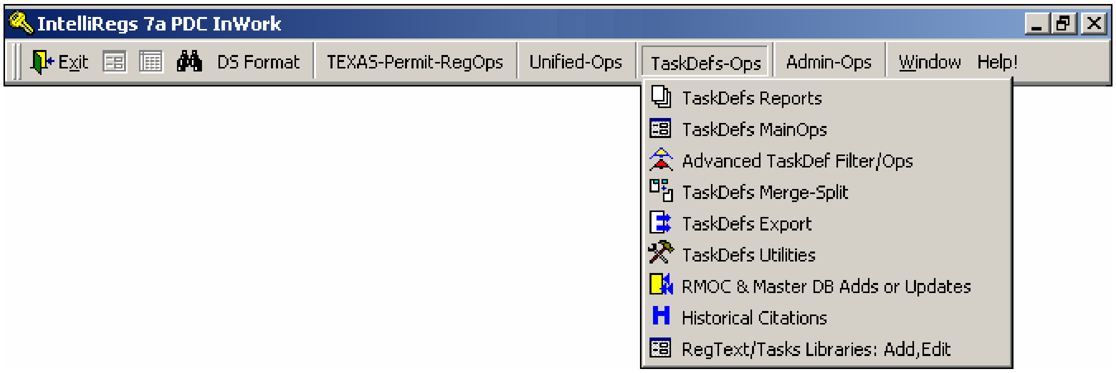
   b.) ***Significance***, i.e., changes in key word occurrences ("hits") in the new rule as compared to the existing rule, which would indicate where compliance tasks should be reviewed and possible revised.

✦ *Re-definition*—Subscribers can use the same RMOC file received from the Service Center to define new compliance tasks, or revise existing tasks, utilizing standard IntelliTask program features and the text from the new rule.

✦ *Implementation*—Subscribers can use the output from IntelliRegs to implement new or revised compliance tasks "in the field," either through importing of the tasks into a tracking system such as TaskTrakker, or copying task descriptions into a work flow system such as Lotus Notes. Contact PDC to discuss task-processing options.

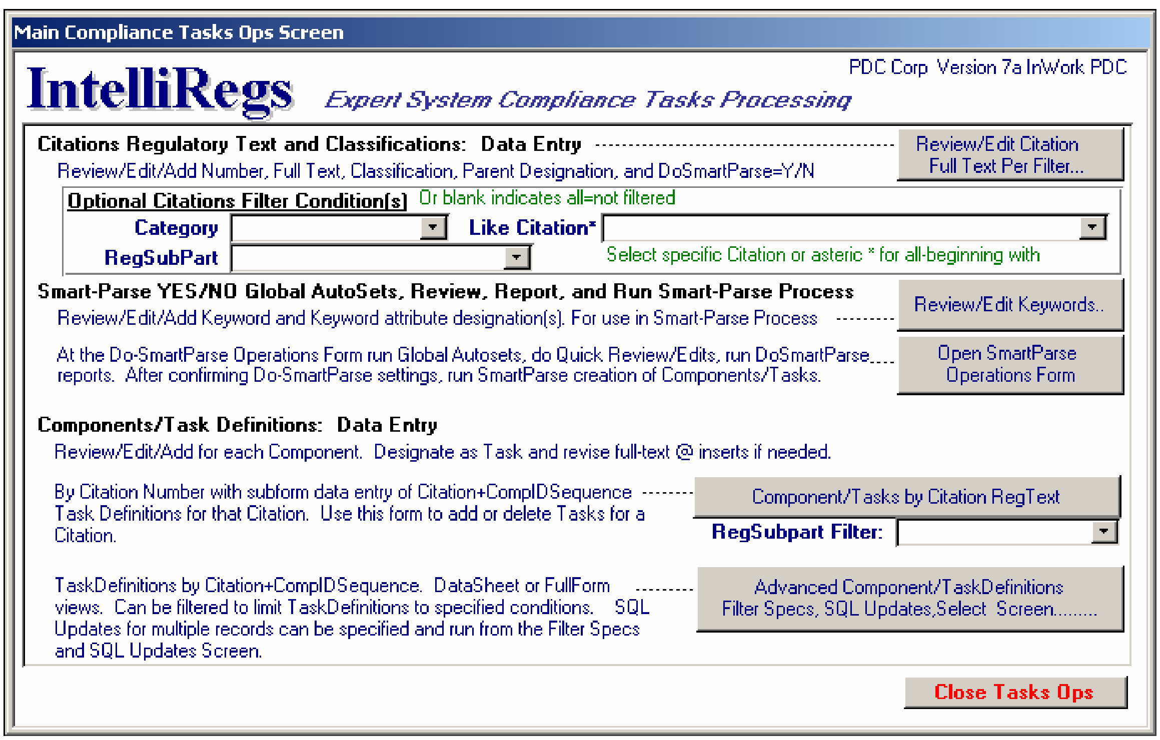
B. IntelliRegs Task Definitions Main Screen

Following selection of **PROCEED** at the ***IntelliRegs Startup*** screen, select *TaskDefs MainOps* from the TaskDefs-Ops menu bar.



B1-B7=Command Selection Operations

Command Selection Operations cover selections made from the ***Main Compliance Tasks Ops Screen*** command buttons.



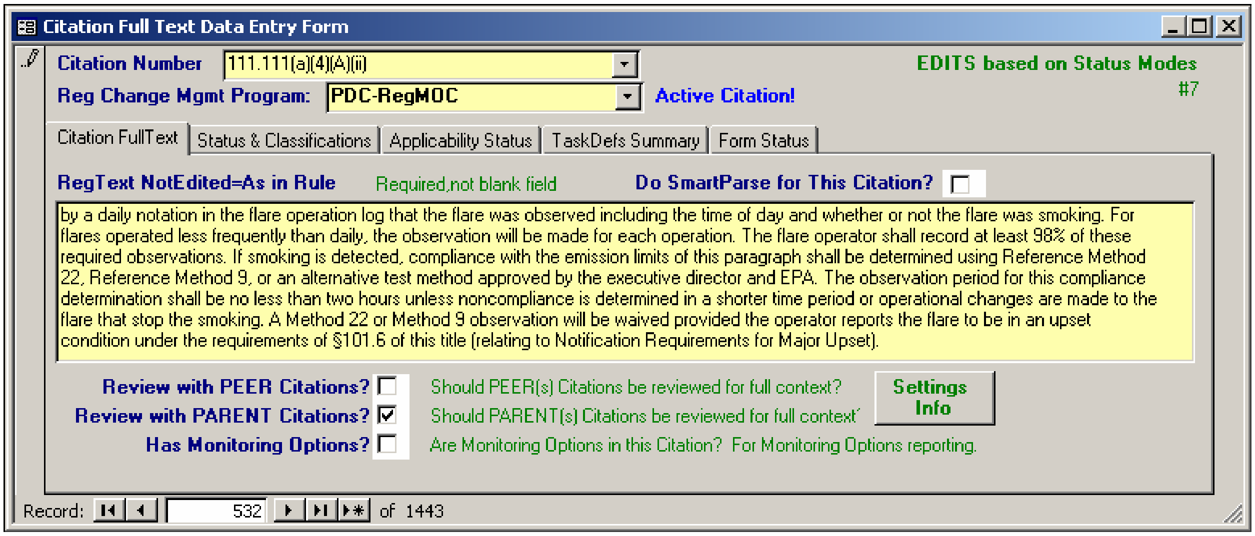
The current program version is identified at the upper right corner of the screen.

Filter(s) can be applied to the Review/Edit Citation Full Text and Component/Tasks forms selected at this main screen.

See the following sections in this User's Manual for instructions on each ***Compliance Tasks Ops*** main screen command button selection.

B1. Review/Edit Citation/Provision Text

Following selection of the **Review/Edit Citation Full Text Per Filter…** command button at the ***Compliance Task Ops*** main screen, the ***Citation FullText Data Entry Form*** appears.



> **Note**: If the text has been imported from IT*Master databases and you will be using PDC's Master Data and Regulatory Management of Change features of IntelliRegs, then the Full Text is not editable as indicated by PDC-RegMOC and a yellow background. Any User-Maintained citations such as NSR permits, PBRs, and SEs are editable and are not updated by PDCs RMOC. The Management of Change features within the program can be employed by the user for User-Maintained citations after login. This is indicated by a blue background.

If the Import Master Data or Import/Export from another IT*=Tasks datafile has been used to populate your Citation/Provision Full Text data, then the Citation_Number and Citation Text will already exist for your review. If imports are not used to initialize your Citation/Provision data, then you will add new Citation_Numbers and then add the Full Text at this screen.

Citation Number: The definitive Citation number with no internal spaces and all braces and numbers/letters to identify the citation paragraph.

> **Note**: "Citation_Number" may also be the Permit number, or any other reference number to a NSR or PBR provision or other regulation/requirement. Permit 3247, Special Condition 2 might have a Citation_Number of 3247~SC02 for example, and a PBR might be 106.261{1997-11-26}.

Reg Change Mgm. Program: Citations that are a part of PDC's Regulatory Management of Change service are identified as PDC-RegMOC and are not available for editing to RMOC subscribers. PDC-Pending citations are ones within the scope of managed Federal and State citation sections that have been identified by a RMOC subscriber, but that are not yet in PDC's Master Library database. These citations will be added to the Master Library as needed. User-Maintain citations are NSR, PBR/SE, T&C, etc. citations, and Federal and State citations if a company is not a RMOC subscriber.

Citation Full Text: No maximum length for this data cell. The Full Text can be obtained from the TCEQ or Federal websites. Enter Citation paragraph text, or cut and paste from other open Windows applications. Enter atsign @ and/or remove periods to revise the SmartParse breakout components.

Text only for the particular Citation Number should be in the FullText field. Do not include text for following, lower level, citation outline Citation Numbers. For example, for Citation Numbers 60.992(a) and 60.992(a)(1), the FullText for 60.992(a) should not contain any of the text that is contained in the FullText for the following, lower-level citation 60.992(a)(1).

> **Note**: The atsign @ can be used to force component breakout, but it may incorrectly be identified as a difference between your stored citation text and the latest revision. Most users will want to remove atsigns @ after running the "Smart-Parse" operation to return the citation text to the original value. Care should be taken to see that the correct spacing and punctuation have been restored after use of the atsign @.

IntelliRegs and TaskTrakker process Citation Applicability to identify all subordinate Citation Numbers for a given Applicable Citation when it is a grouped=[G] citation. For example, if the applicable citation was [G]60.992(a) (indicating a "group" citation applicable), then data from 60.992(a), (a)(1), and (a)(1)(A) would be identified as applicable detail Citation Numbers for development/retrieval of tasks data. Also, see documents in **Section F** for additional information on selection of detail citation data for "applicable citation numbers".

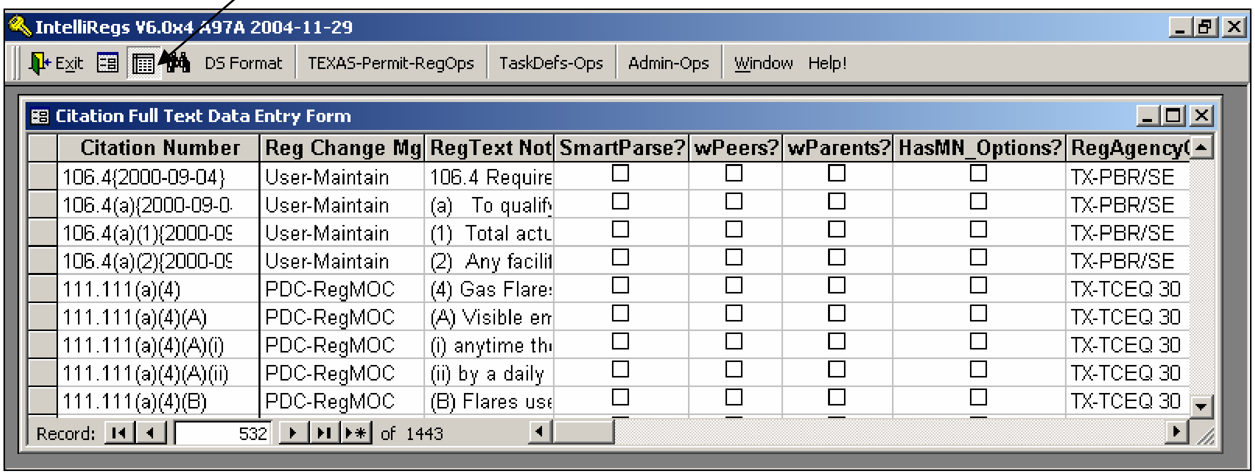
Do In Next Smart-Parse Processing?: Checked=YES to have this Citation/Provision processed in the SmartParse process the next time SmartParse is run. See **Sections B2** and **B3** for more on SmartParse operations.

Review with PEER Citations, ...PARENT Citations, Has Monitoring Options?: Sometimes citation text does not make sense as it stands alone, but needs the preceding outline level citation (Parent) to convey a complete thought. Also, Peer citations (ones at the same outline level) may need to be identified when citation text reads, for example, "Do all of the following:"

If citation text has several options to perform monitoring, such as with a thermocouple, ultraviolet beam sensor, or infrared sensor, the citation can be flagged and reports generated for Annual Compliance Certifications.

The first figure shows the “Form-View” of Citation Full-Text form. Optionally, you may switch to and from a “Datasheet-View” of this form by selecting the **Datasheet View** or **Form View** icons from the IntelliRegs menu bar as shown below.

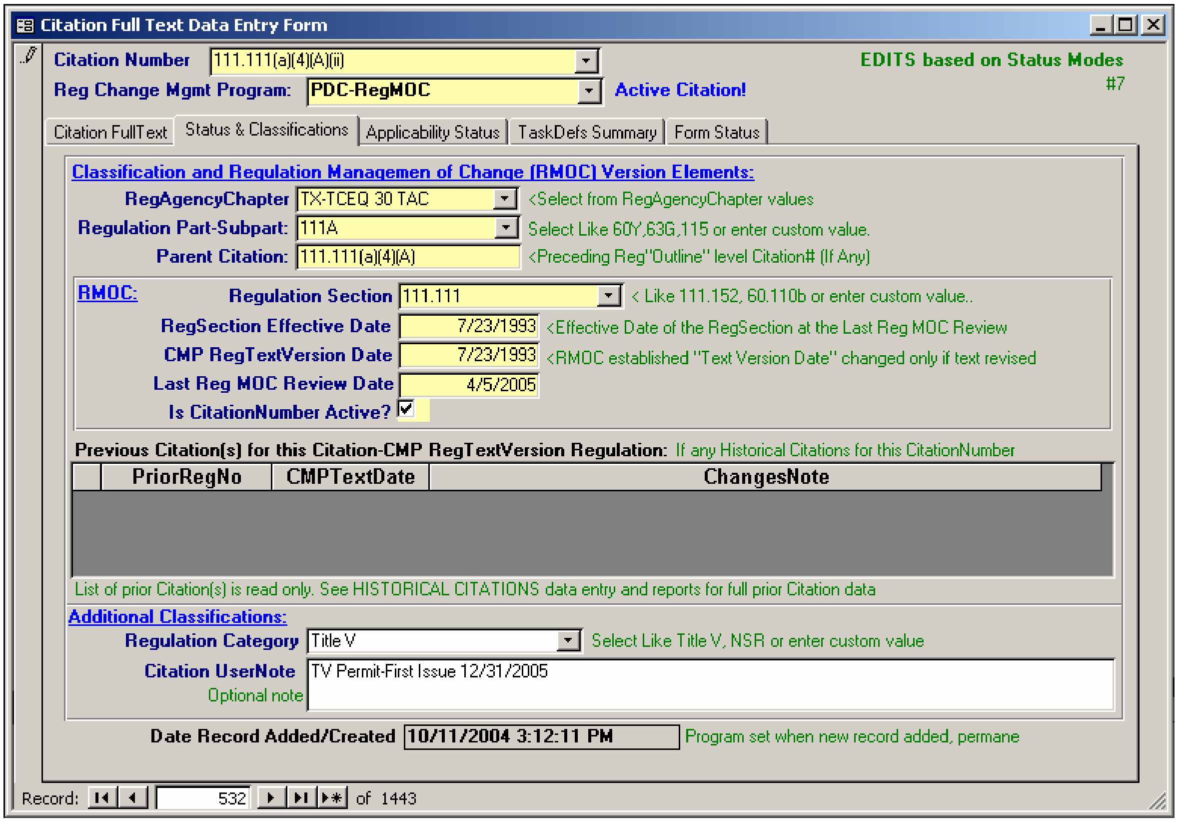
Select Grid to review/edit Citation Full-Text in a Spreadsheet format



The same dropdown lists are offered in the spreadsheet view as available in the full-screen form view. Use DSFormat from the menu bar to modify sheet appearance.

Switch back to the form view by selecting the **Form** icon on the Menu bar (just left of the **Grid** icon pointed-to above).

Next is the **Status & Classifications Tab**.



<u>RegAgencyChapter</u>: The Citation/Provision Agency. Select from dropdown list or add the required value into the <u>RegAgency-Chapter</u> table available under *the RegText/Tasks Libraries: Add, Edit* menu selection.

<u>Regulation Part-Subpart (User Defined)</u>: Citation/Provisions can be processed by their Citation Groups as entered at this data entry screen. Group names/IDs are determined by users to enable extensive program flexibility. Once a group has been used, it is then offered in the selection picklist. Selection from the picklist standardizes group names and speeds up assignment of the Citation Group. For example, Federal may be by Part and Subpart (60Kb), State by Regulation and SubChapter (111A), NSR by Permit Number (NSR-3247), and PBR by Section and Date (106K{1997-11-26}). See other paragraphs in the User's Manual section which involves selection by Citation Group!

<u>Parent Citation</u>: Particularly important if text at a higher level of the Citation numbering contains information essential to understand the meaning of this Citation_Number's text. By identifying the "Parent" Citation_Number it makes the preceding level parent's text available for quick review at the Citation-Components Form, see **Section D1e** for form instructions.

> **Note**: An example of Parent Citation use would be for a Citation_Number 111.111(a)(4)(A)(ii), where the text of Parent=111.111(a)(4)(A) might read "compliance with this subparagraph for process gas flares shall be determined:…". The text of 111.111(a)(4)(A)(ii), which reads… "by a daily notation in the flare operation log…", requires the Parent text to be understood.

Parents can have Parents that have Parents. There is no limit to the levels of Parent citation text geneology in IntelliRegs tasks.

Regulation Section: The highest level of Federal or State citation number (111.111) for that paragraph.

RegSection Effective Date: Date citation section became active, or latest date amended, from source text on TCEQ or Federal website.

> **Note**: Import from Master citations will insert this date when citations are added from Master or optionally revised when citation text is validated identical for regulation "revisions".

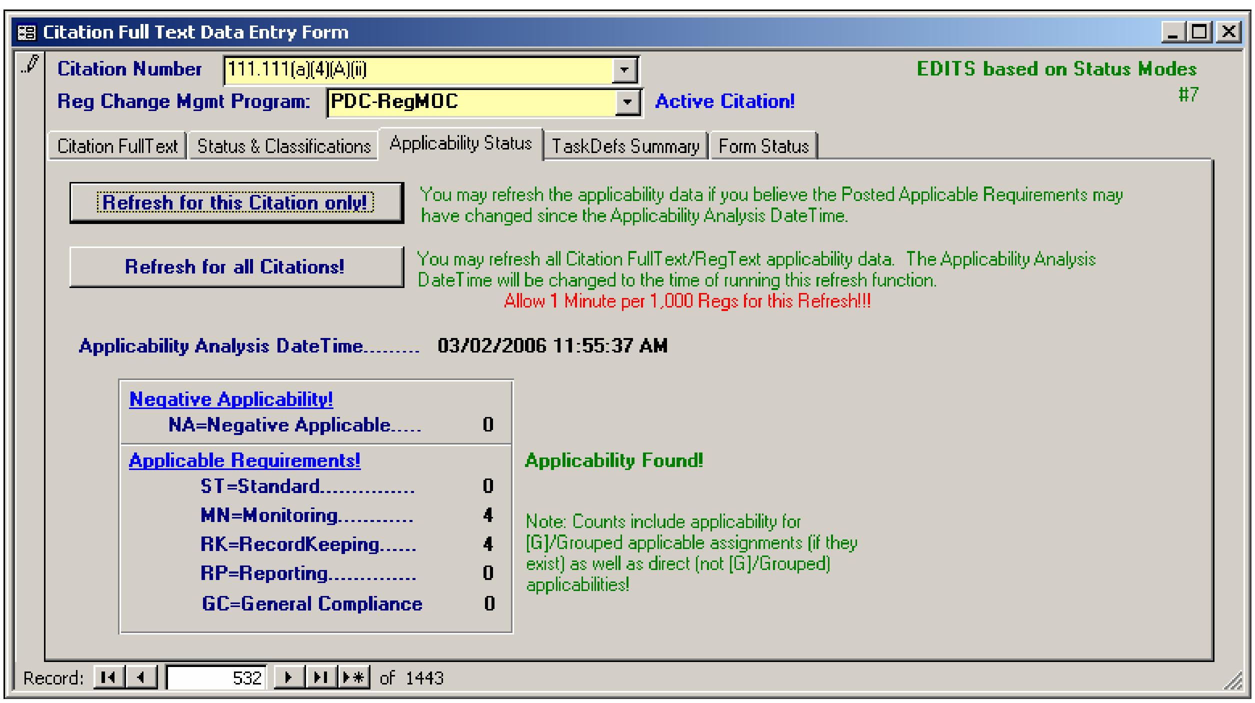
CMP RegTextVersion Date: The date the text for that individual citation changed. Although the date of the entire section may change periodically, the actual text for an individual citation may remain unchanged for a number of years.

Is CitationNumber Active?: Checked=YES as default unless Citation Number is no longer valid due to renumbering, deletion, etc.

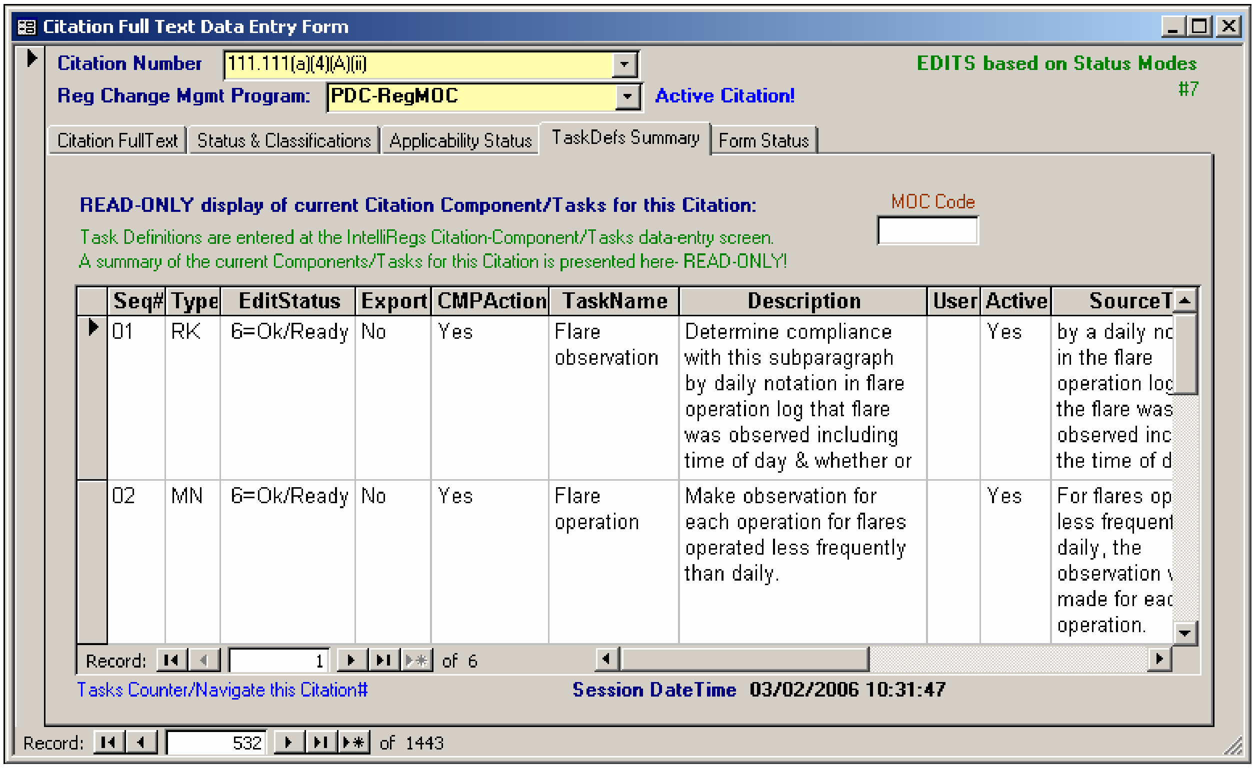
Regulation Category: The type of Regulation this citation pertains to i.e., Title V, PBR/SE, NSR, PSD, Safety & Health, Haz Waste, etc.

Citation UserNote: User-defined for any type of information about citation.

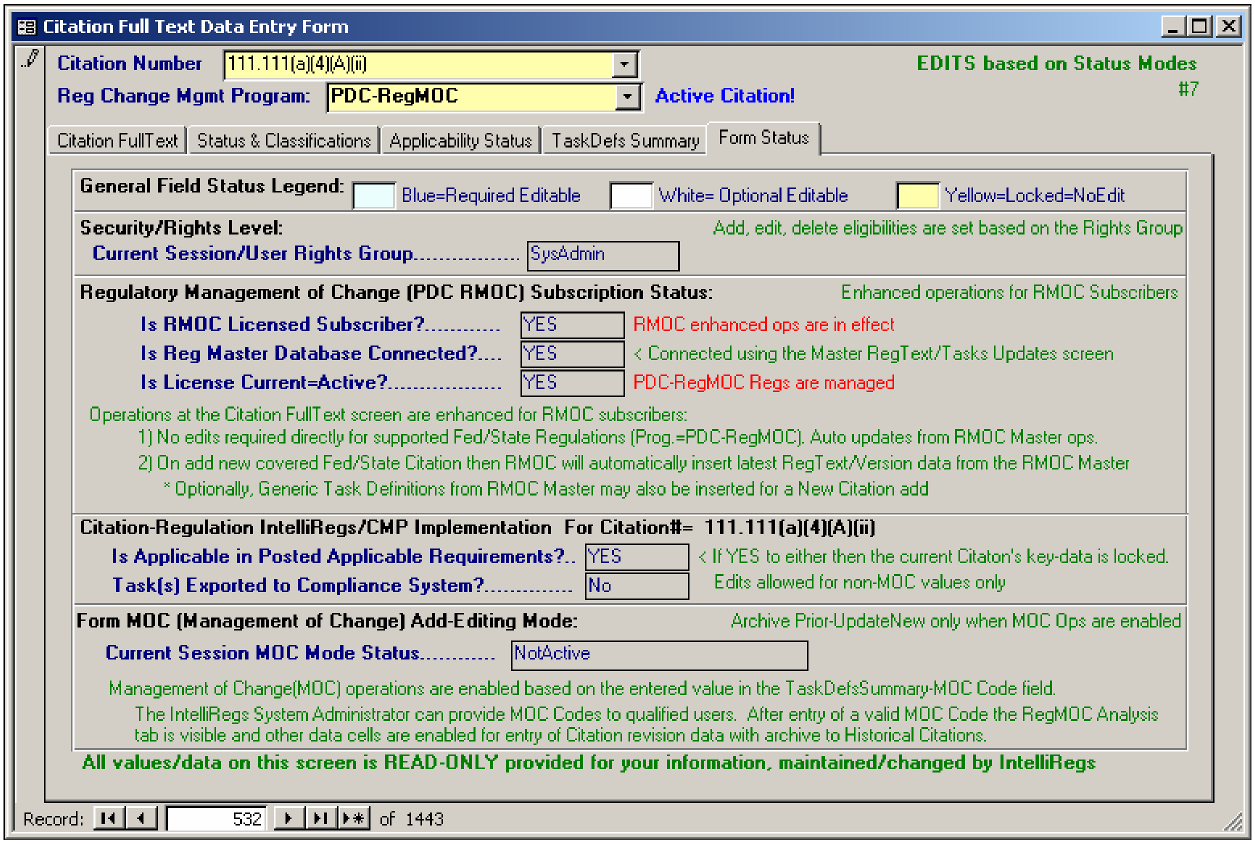
The **Applicability Status Tab** shows the number of times this citation has been applied to equipment in the database for each Requirement type.



The **TaskDefs Summary Tab** shows a summary of the current Components/Tasks that have been developed for this citation. This is READ ONLY! The definitions are developed at the IntelliRegs Citation-Component Tasks data-entry screen.



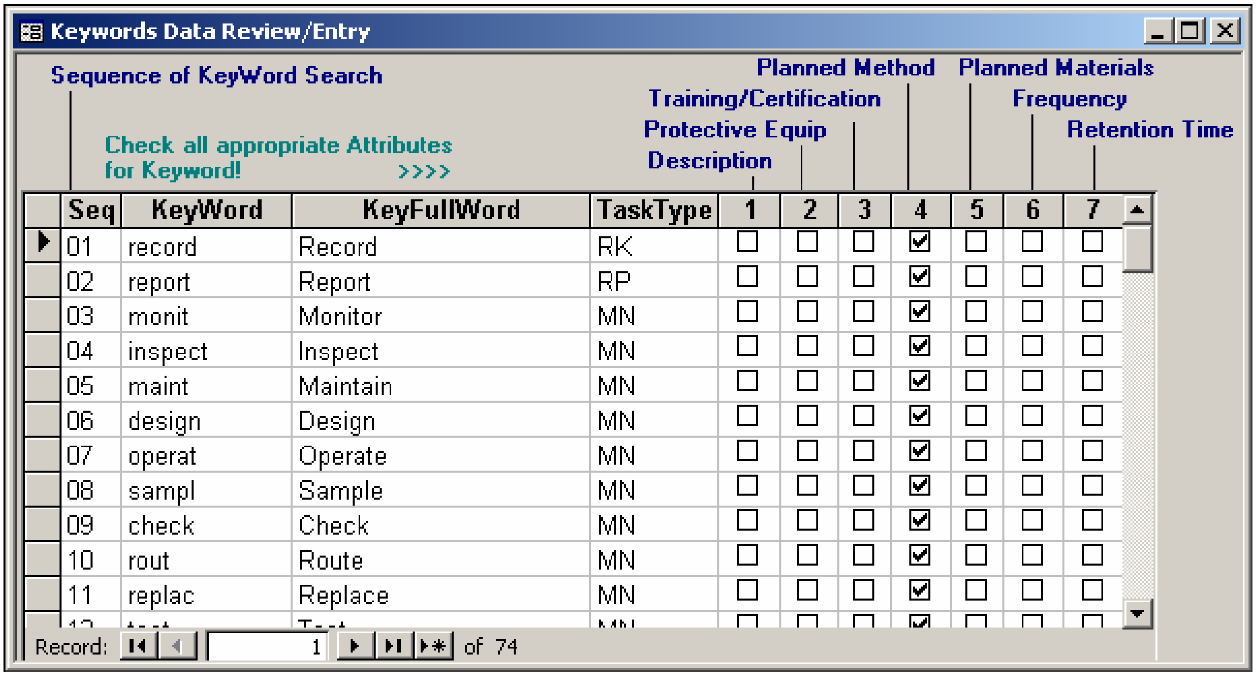
The **Form Status** Tab shows current session User Rights, RMOC license status, Reg Master database connection status, applicability for citation, export to Compliance System status, and current session Management of Change status.



B2. Review/Edit SmartParse Keywords

Following selection of the **Review/Edit Keywords…** command button at the ***Compliance Task Ops*** main screen, the ***Keywords Data Review/Entry*** form appears.

Keywords are searched for during the Smart-Parse processing according to the contents of the Keywords table. Keywords can be added, deleted, and edited at the ***Keywords Data Review/Entry*** screen.



Seq	KeyWord	KeyFullWord	TaskType	1	2	3	4	5	6	7
01	record	Record	RK	☐	☐	☐	☑	☐	☐	☐
02	report	Report	RP	☐	☐	☐	☑	☐	☐	☐
03	monit	Monitor	MN	☐	☐	☐	☑	☐	☐	☐
04	inspect	Inspect	MN	☐	☐	☐	☑	☐	☐	☐
05	maint	Maintain	MN	☐	☐	☐	☑	☐	☐	☐
06	design	Design	MN	☐	☐	☐	☑	☐	☐	☐
07	operat	Operate	MN	☐	☐	☐	☑	☐	☐	☐
08	sampl	Sample	MN	☐	☐	☐	☑	☐	☐	☐
09	check	Check	MN	☐	☐	☐	☑	☐	☐	☐
10	rout	Route	MN	☐	☐	☐	☑	☐	☐	☐
11	replac	Replace	MN	☐	☐	☐	☑	☐	☐	☐

Seq = Sequence Number: Keywords are searched for in Sequence of Keyword Search order. You can enter any four-place "numeric-alpha" value into the Sequence Field, but you cannot have duplicates of a Sequence Number, i.e. only one row can have a sequence= "03". As shown in the example screen, you can include alpha characters, such as "01a" to insert Keyword searches or of course all could be renumbered 01, 02, ….

KeyWord: A word or part of a word to search the text string for.

> **Note**: The process finds any occurrence of the Keyword. For example, if you entered a Keyword = "to" then the presence of words "into", "toward", "total" would result in a find for the Keyword. So, Keywords should be a relatively meaningful word or part of a word.
>
> **Note**: Short phrases can be entered such as "true vapor". If "shall not" was made a Keyword and "shall" was a keyword then the presence of "shall not" would cause a find for both the "shall" and the "shall not" Keywords.

KeyFullWord: The word of a phrase inserted into a checked attribute data cell if the Keyword is found within the searched citation components broken-out text.

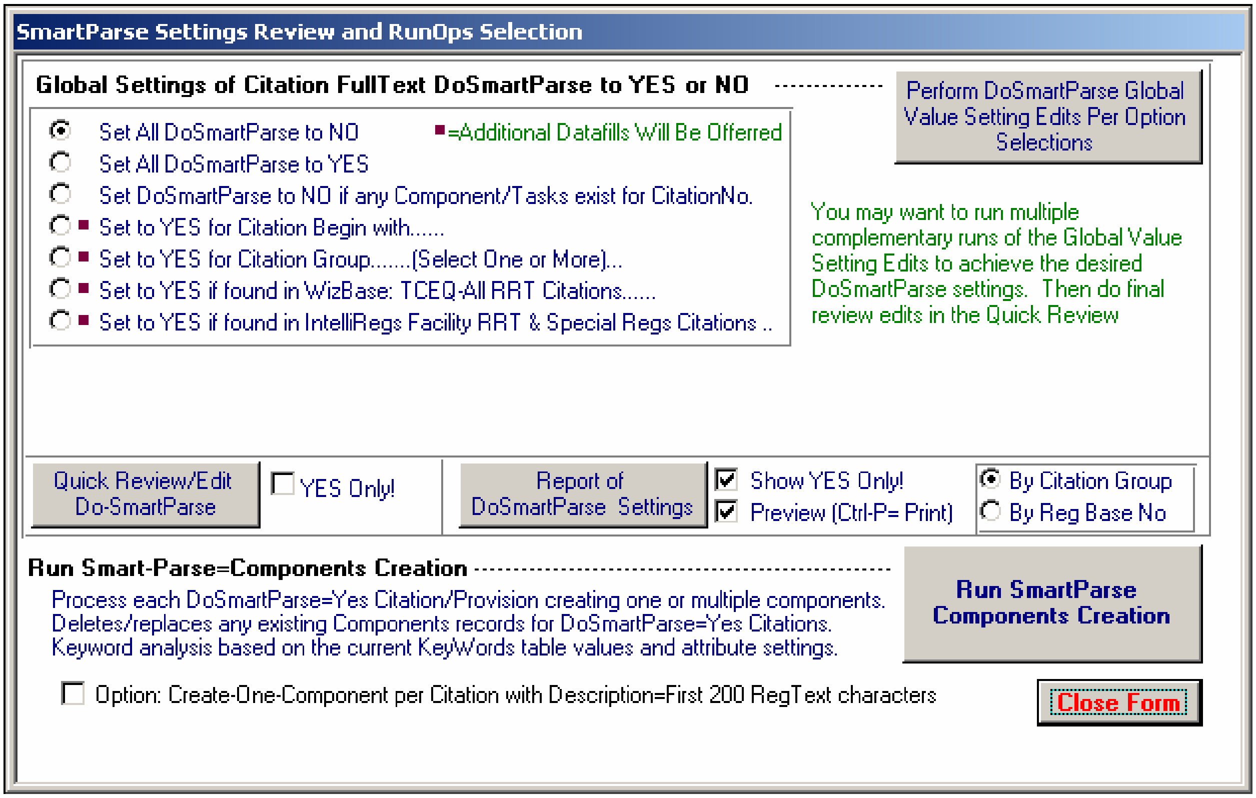
<u>Different KeyWord Sets For Different Citation Types</u>: It is anticipated that different Keyword sets may be desired for processing against different Citation types. For example, different Keyword searches for Spill Prevention Regulations than for TCEQ Tank Regulations?

See the OpsManual **Sections B3: Review/Edit/Run SmartParse Processing and Section B4: Review/Edit Components/Tasks**.

B3. Review/Edit/Run SmartParse Processing

Following selection of the **Open Do-SmartParse Operations Form** at the main screen, the ***SmartParse Settings Review and RunOps Selection*** form appears.

Setting of DoSmartParse to YES or NO, review of the settings, and run of the SmartParse operation are performed from this screen.



See **Section 5**: Task Definition Attachments for DoSmartParse Report Examples.

The SmartParse Settings Review and RunOps Selection screen enables Global Settings of Citation FullText DoSmartParse to YES or NO based upon the selected settings options.

In the *Set to Yes if found in WizBase* option, any Citation/Provision number which is a definitive citation number of any applicable citation in the TCEQ's RRT diagrams is set to YES. (See discussions on "**Applicable Citation Number**" and "**Definitive Citations**" in other User's Manual Sections.)

In the Set to Yes if found in WizBase Facility RRT & Special Regs Citations option, any Citation/Provision number which is a definitive citation number of any applicable citation determined for the facility either by OP-UA form equipment attribute values entry (RRT Determined applicable citations) or citations determined a "Special Regs", including imported engineer-determined applicable citations, is set to YES.

The *Option: Prerun set DoSmartParse* to NO is checked by default to prevent overwriting any Component/Tasks that may exist for that citation. If you uncheck this box, all existing Component/Tasks will be deleted and new blank components will be created by SmartParse.

The *Option: Afterrun set all DoSmartParse to NO* is also checked by default. This prevents SmartParsing the citations again accidentally. Only new citations added to the database will have SmartParse set to YES.

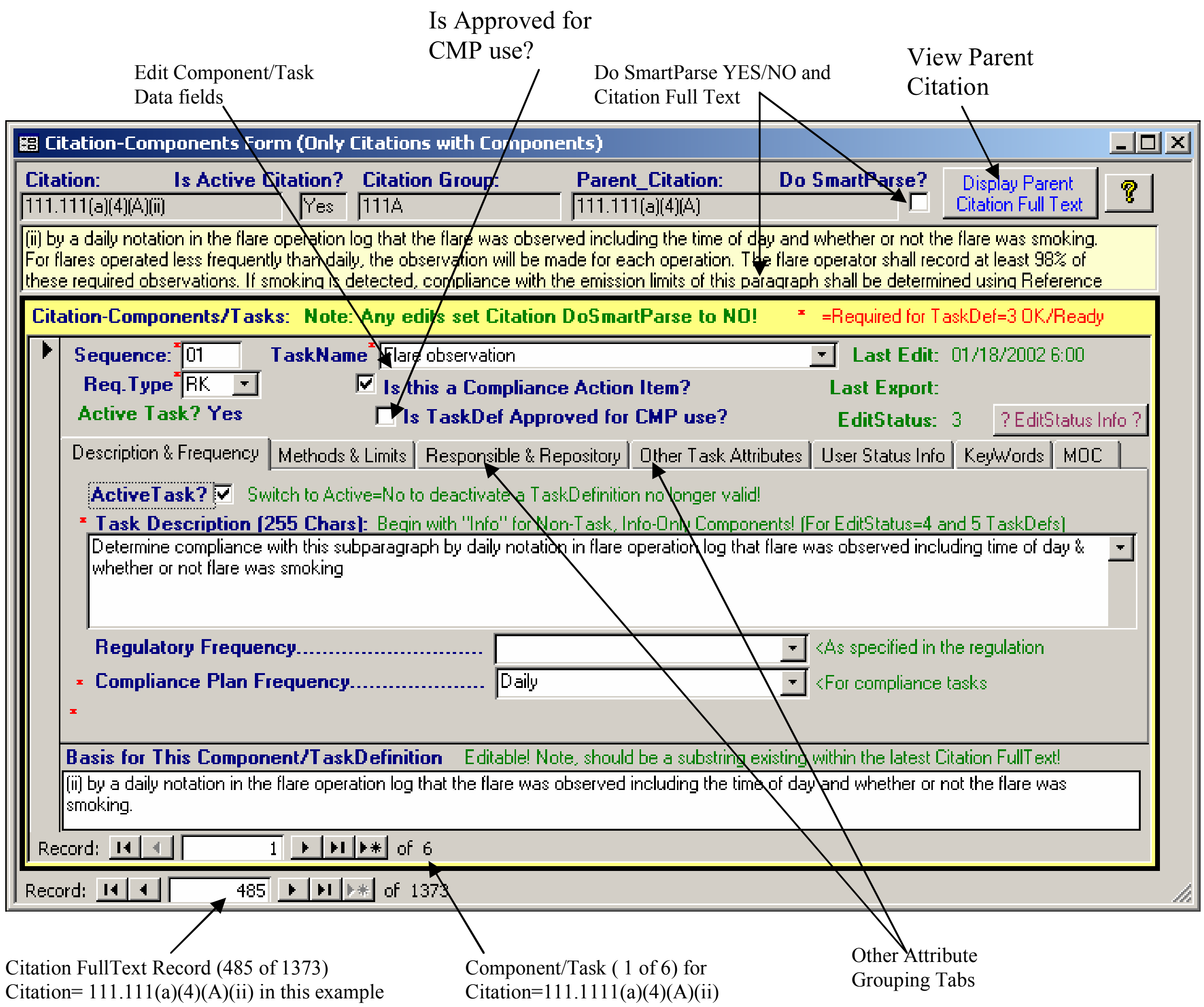
If a citation greater than 3,000 characters is submitted for SmartParsing, IntelliRegs will display a message box informing you that SmartParse will not create any components. This is usually the case where a citation contains multiple definitions or terms within a single citation number. After running SmartParse for a group of citations, these citations will remain checked to *DoSmartParse*. The *Option: Create-One-Component per Citation* can be then be checked to create a single component with the first 200 characters of the Reg text as the description. You may then edit the description as desired to create a summary of the Reg text.

After Confirming Do SmartParse=YES Settings Are Correct… Run SmartParse: When DoSmartParse settings have been confirmed correct by you, select the **Run SmartParse Components Creation** command button to create/replace Citation Component/Task records for all DoSmartParse=YES citations.

Following the Run SmartParse Components Creation, the newly created Component/Tasks and already existing Component/Task data are available for review and edit. **See Section B4. Review/Edit Component/Tasks** in this OpsManual.

B4a. Review/Edit Components/Tasks

Following selection of the **Component/Tasks By Citation RegText…** on the ***Compliance Tasks Ops*** main screen, the *Citation-Components Form* screen appears.



Citation Components do not become eligible for export to the Compliance Management System until they have been edited to a Status=3 Valid Task, reviewed, and **IS APPROVED FOR CMP USE?** has been checked to Status=6. This allows for review and edits by various people such as managers and operators to ensure the task description best represents the task to be done before it is forwarded to the CMP.

Key features of the ***Citation-Components*** screen are noted above. Data entry fields for the Component/Tasks are presented on five different form tabs:

Form Tabs:
Description & Frequency
Method & Limits
Responsible & Repository
Other Task Attributes
User Status Info

Each tab screen is reviewed in this section of the User's Manual following instructions and review of general function and header data entry.

Note the outer record navigation controls (above as "485 of 1373") and the inner record navigation controls. The outer record controls refer to the citation number; the inner record controls refer to one or more component/tasks of the citation. Navigate to next, previous, beginning, end of all citations within the task definitions database using the outer controls, navigate component/task to component/task using the inner controls.

You can optionally view the list of citations as a spreadsheet by selecting the "**Datasheet View**" icon from the IntelliRegs menu bar. Use the datasheet to scroll the list of citations. When at the row of the desired citation, select the "**Form View**" icon from the menu bar to return to component/task full screen view.

The "outer" record information=citation information displays the entire citation paragraph text in the upper screen with the *Citation Group* and *Parent Citation* identified. The *Do In Next SmartParse* checkbox and *Basis for This Component/TaskDefinition* are editable if required. The *FullText* at the top of the screen is not editable. You must return to the ***Compliance Tasks Ops*** main screen***, Full Text*** screen to insert or remove atsign @ characters if a rerun of the SmartParse is appropriate. (See **Citation Full-Text** editing instructions and the **SmartParse** settings paragraphs of this User's Manual for more information on using the atsign to force additional SmartParse breakout of Component Tasks.) If atsigns are added, then it is recommended they be removed after running SmartParse to restore the citation text to original status. This is an important step if you are a licensed RMOC subscriber to enable the RMOC Update to successfully compare citation Full Text.

The citation full text remains visible during data entry for each tab-group component/task attributes data for reference.

The Citation-Components "header" data items, *Sequence*, *Task Name*, *Task Type, Is this a Compliance Action Item?,* and *Is TaskDef Approved for CMP Use?* are also visible and editable during all of the tab group data entry.

Sequence: Unique for each citation paragraph. 01, 02, 03, … Task IDs as required. Numbers are created by the SmartParse component/task operation. If you add tasks, or wish to insert tasks, then you will want to edit these numbers. It is recommended to retain the "leading" zero format to have the order correct if 10 or more tasks are defined. In most cases, you will want the sequence to follow the order as subparagraphs appear in the full text. However, if a task has been exported to TaskTrakker, the sequence number cannot be altered. If you need to add a new component for that citation e.g., if a new paragraph has been inserted because of a rule change, it should be added as a new sequence number at the end.

Is this a Compliance Action Item? Checkbox: Checked means that the Component/Task is defining a Compliance Task. Not checked=No means that the Component/Task breakout from the full text does not represent a compliance task, but contains important information to be forwarded to the CMP for reference. Task definitions exported to TaskTrakker (See the **Export to TaskTrakker** section of the User's Manual.) exports Component/Tasks that have been designated as *Is TaskDef Approved for CMP use?*=True/Yes. If the text contains only

unimportant information, but nothing to create a task definition from, uncheck the *Is this a Compliance Action Item?*, remove the *Req. Type*, and type "Info" into the description field.

Fill in remaining Task data cells for this citation only if NOT Info item!

Task Name: A 50 wide max entry cell to enter a summary name for the task. Tasks for different citation paragraphs can have the same name. The small field width has been enforced to use on reports and screens where space is very limited. You will want to develop a uniform/standard format for your task names or follow the task name conventions as delivered (optionally) from import of the PDC maintained Citation Master data files.

Task Type: Select a valid *TaskType*, ST, MN, RK, or RP, from the drop-down list offered. Each task must be classified as one of these Task Types according to the applicability of the citation.

> **Note**: Each "Component/Task" record should represent an individual compliance task. If the existing SmartParse failed to breakout adequately, then manually create tasks for breakout paragraphs as needed or insert atsigns @ and rerun SmartParse to create additional breakout Component/Task records.

Occasionally, a single breakout may represent several tasks, and it will not be appropriate to perform the breakout differently. An example of such a breakout might be the following:

> "Monitor to ensure weekly, monthly, and annual emission limits are not exceeded."

In the example above, you will probably want to create weekly, monthly, and annual monitoring tasks for the same broken-out citation component/task. Most users favor adding two new tasks, entering the same breakout text (copy and paste), and creating the unique, separate (in this case weekly, monthly, and annual) task definitions. Renumber the sequence of all tasks for the citation to achieve the desired task sequence for reporting and analysis.

The Smart-Parsed "***Basis for This Component/TaskDefinition***" is the complete breakout from the citation for this Component/Task. This data cell can be edited, but should be edited only to split into multiple component/tasks, i.e. manually create a different Component/Task breakout version, respecifying and rerunning the SmartParse, or to combine components that should not have been broken apart. For example, SmartParse would see the period after the i in i.e. as the end of a sentence. If the management of change analysis identifies that the full-text of a citation has changed, then the examination of each broken-out component for changes will aid in identifying the particular tasks requiring changes/updates. That is, if the broken out text is still a part in whole of a citation paragraph without change, then it is likely that the task definition is unchanged.

Do SmartParse is set to Unchecked=NO after running: If you have unchecked this default setting before running, then SmartParse would remain checked to YES. If you edit Component/Task data, Citation *DoSmartParse* is automatically unchecked to prevent your Component/Task data from being accidentally replaced when the next SmartParse processing is run. If you want to set *DoSmartParse* at the Citation level back to checked to delete and create new components, this can be done in the upper section of the screen or at the ***Review/Edit/Run SmartParse*** screen.

EditStatus, Last Edit, and Last Export: Each task is automatically assigned an edit status by the program of 1, 2, 3, 4, 5, or 6. A status 1 would be for a citation that has been smart parsed only.

There is no citation + requirement type component defined. A status 2 has some information entered, but still requires editing and work to be a completed task. A status 3 has all required attributes for export to TaskTrakker, but has not had final approval. A status 4 or 5 means that the text is information only. This is assigned only after the user has looked at the text and determined that there is no task and indicates this by entering "Info" into the task description, deleting the Req. Type, and unchecking the *Is Task* checkbox. This will not be exported to TaskTrakker, but remains in the database for reference. A status 6 has had final company approval and is ready for export to TaskTrakker.

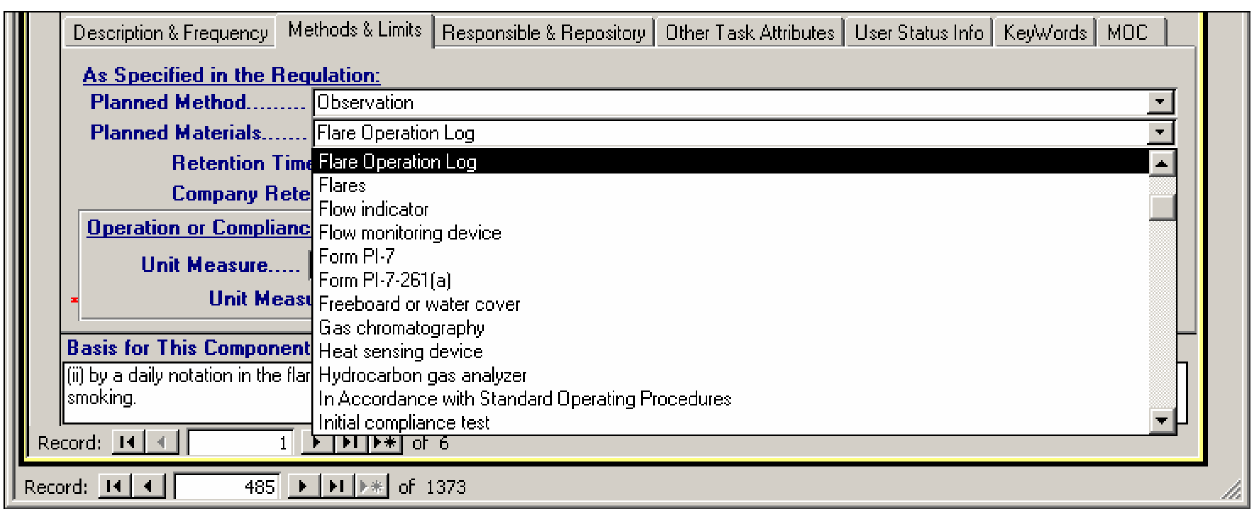
The *Last Edit* is the date on which any work was done on that citation. The *Last Export* is the last date the task was exported for use in TaskTrakker.

Use Copy-And-Paste to Enter Attribute Data Quickly: You will probably want to copy and paste data from the citation full text cell, or from the component/task breakout text, into the Component/Task attribute cells.

Copy = **<Ctrl>** + **<C Key>**
Paste = **<Ctrl>** + **<V Key>**
Copy from same field in previous record = **<Ctrl>** + **<" Key>**

A feature of all Task data entry tab groups is the display of attribute data entry specifications or description at the Windows status bar (in the left bottom of the IntelliRegs application window). When your cursor is at a particular cell, information on the attribute is presented in the status bar.

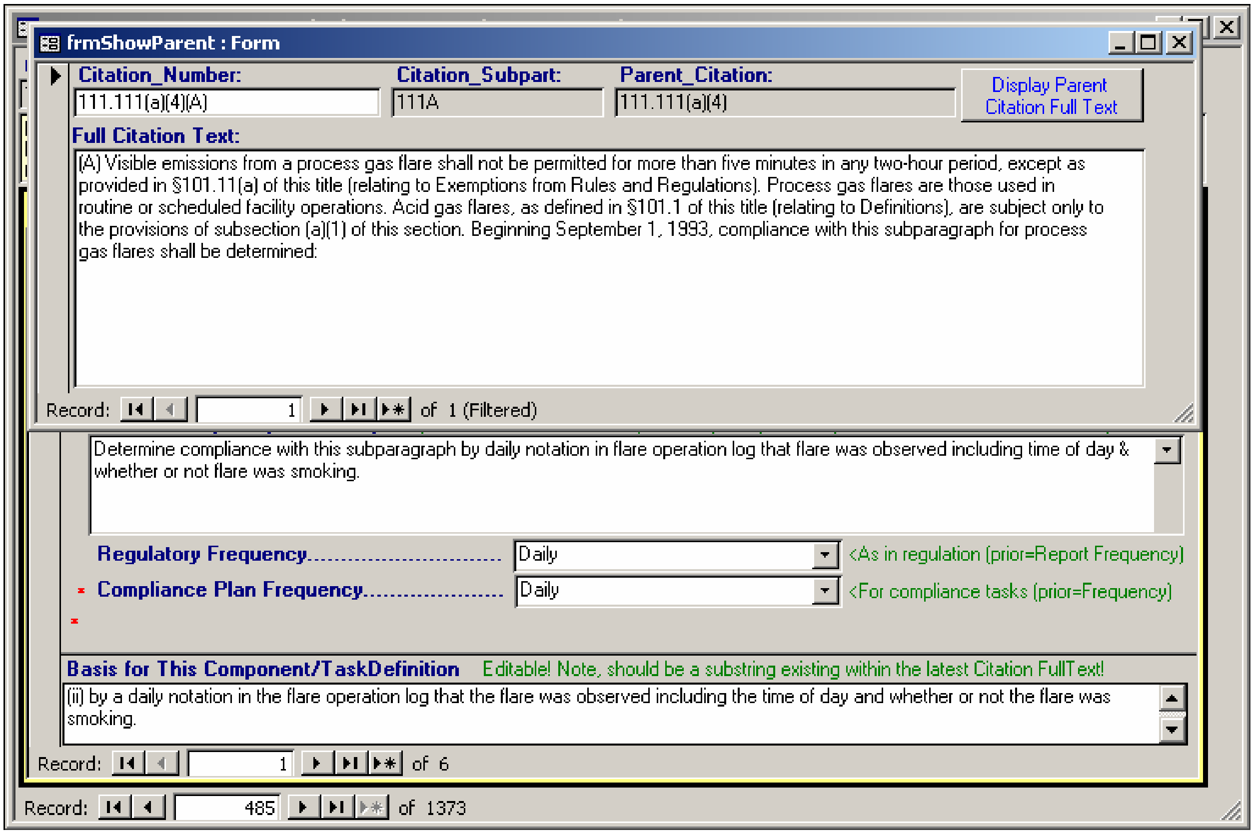
Another powerful user entry feature on the tab group entry screen is custom "on-the-fly" building of dropdowns for key attributes. For example, the *Planned Method* and *Planned Materials* attributes can be typed in or selected from a list of all prior values used for that attribute for your facility. You will need to "move off " of a citation to save the entered value and make it an available selection! An example of a drop-down of user-created historical values for *Planned Materials* is shown below:



Additional entries will be selectable after they are entered during your Task definition development. The creation of dropdowns from your prior entries promotes consistent format for

attribute values and reduces data entry time. To modify a prior entered value to a new value, simply select from the dropdown and edit the value as required. Both the prior value and your new value will be available for dropdown selection for following tasks.

Another feature offered in the header section of the Component/Task data entry form is the ability to review the parent citation text for any citation in work. Select the **Display Parent Citation Full Text…** command button to review as shown.



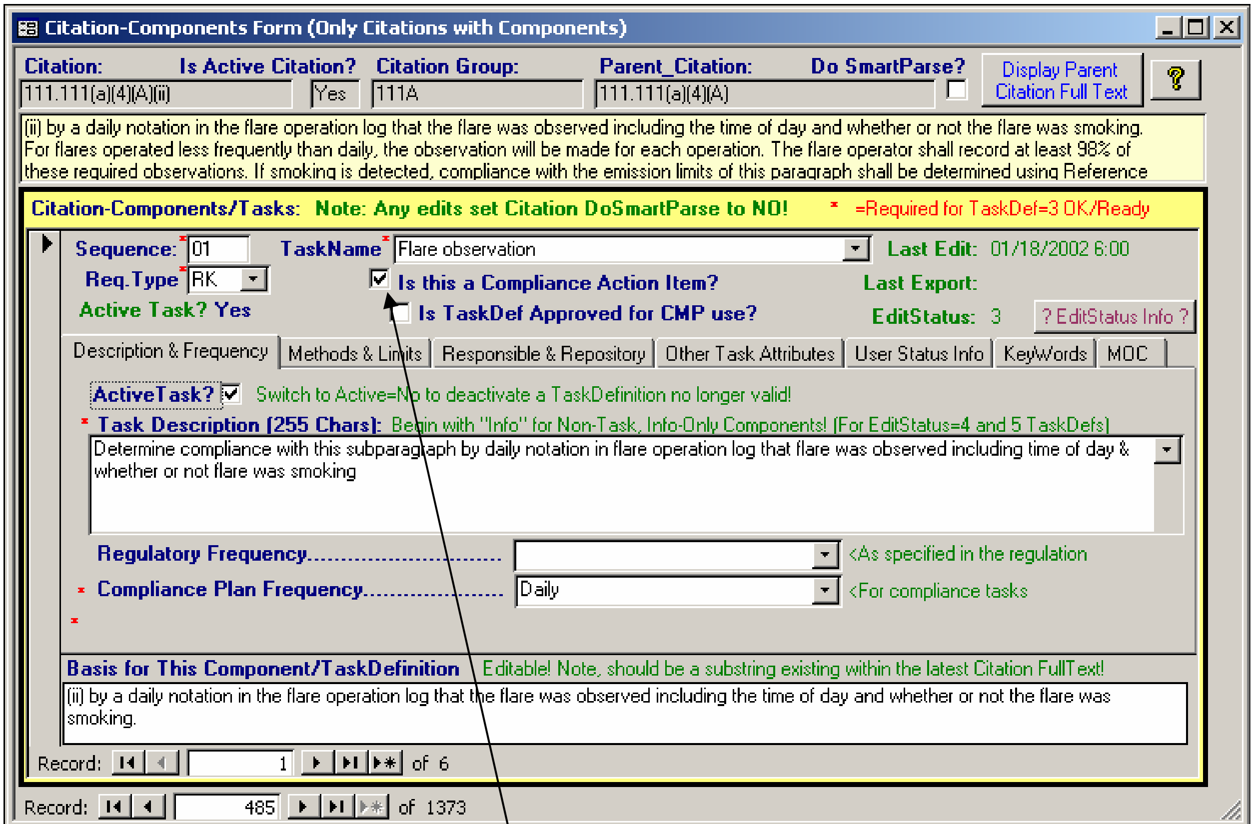
Review of a parent citation can better provide the citation context for a particular citation text.

> **Note:** The parent citation may also have a parent citation which can be next reviewed by selecting the **Display Parent Citation Full Text** button on the ***frmShowParent: Form***,… and on… and on…, until the top-level citation is displayed (a citation with no Parent!)

This remainder of this User's Manual, Section B4. Review/Edit Component/Tasks, covers data entry for each of the tab-group task data entry views.

B4b. Task Description Attributes

The left-most tab of the Component/Task data entry form, when selected, displays **Description & Frequency** attribute data elements for review and editing. The tab-group screen is shown below:



Note that the *Is this a Compliance Action Item?* checkbox has been checked for this Component/Task item. From now on, we will refer to the item as a "Task Definition" or simply a "Task". Review and data entry at all tabs should be made for the Task.

One editable field, *Task Description*, is on the **Description & Frequency** tab.

For the Task Description, you can cut and paste from the broken text box, or directly type in your entry. Because the description field is limited to 255 characters, some reduction from the entire broken-out text may be required.

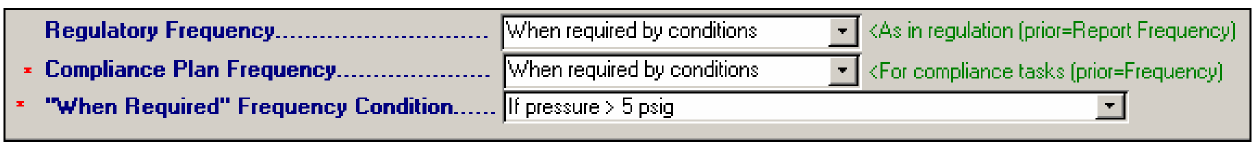
This can be done without impacting the meaning by removing extraneous words such as "a" and "the", and shortening words such as "and" to "&", and "control device" to "CD". There is no standard or right or wrong description format, but whatever the style you decide, it is best to maintain that style for all defined tasks.

Some users prefer to summarize and shorten from the broken-out text, others prefer to use as much of the text as possible within the task description. The use of the additional fields available

in the program enable you to enter information such as Frequency, Method, Materials, Protective Equipment or Training/Certification Required instead of entering all of this information into the task description field.

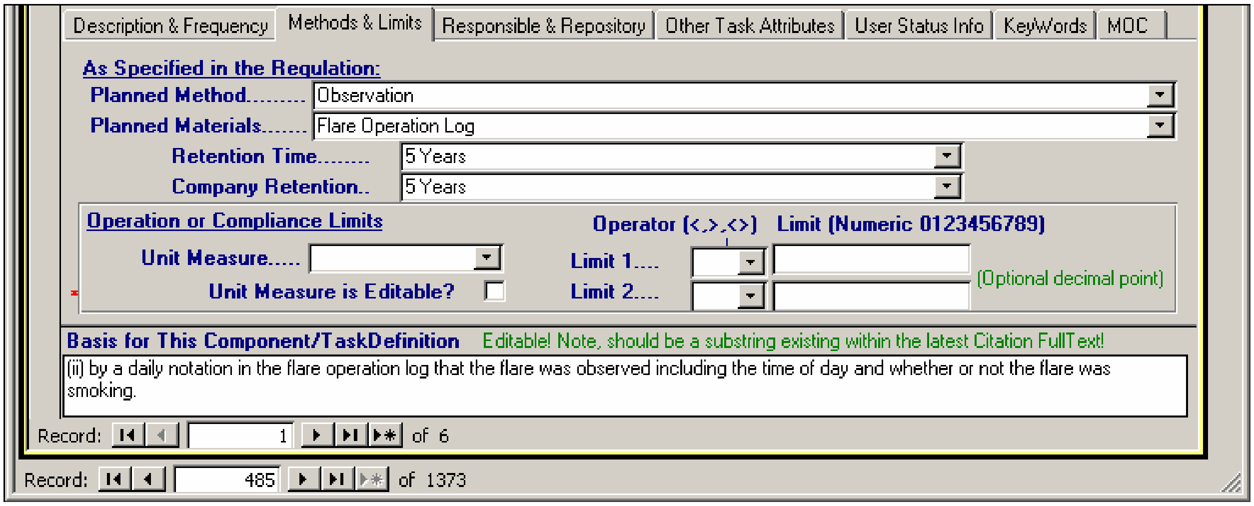
The *Frequency* field offers a dropdown, but this list is from a valid list, not the selections from prior entered value lists. The *Regulatory Frequency* is the frequency as stated in the Federal or State regulatory text, such as Daily, Weekly, Monthly, etc. The *Compliance Plan Frequency* is the frequency that your company does a specific task. For example, the Regulation may have "Monthly" as the frequency, but your company has decided to perform that particular task "Weekly".

Some tasks will only be done if certain conditions exist. If "When required by conditions" is chosen for *Frequency*, then the **"When Required" Frequency Condition** dropdown box becomes available. You must enter the conditions that would cause the task to be done in the *"When Required" Frequency Condition* text box. This field is also a custom "on-the-fly" building of a dropdown.



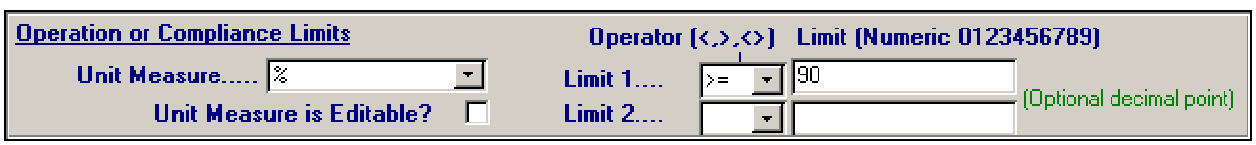
B4c. Method/Limits Attributes

Enter Task attributes of the Method/Limits group by selecting the **Method/Limits** tab to open the data entry window as shown below:



Dropdowns in other attributes on the **Method/Limits** tab group follow the "on-the-fly" dropdown creation process.

Enter Task attributes for *Unit Measure*, *Operators*, and *Limits* at the Method/Limits tab group as show below:



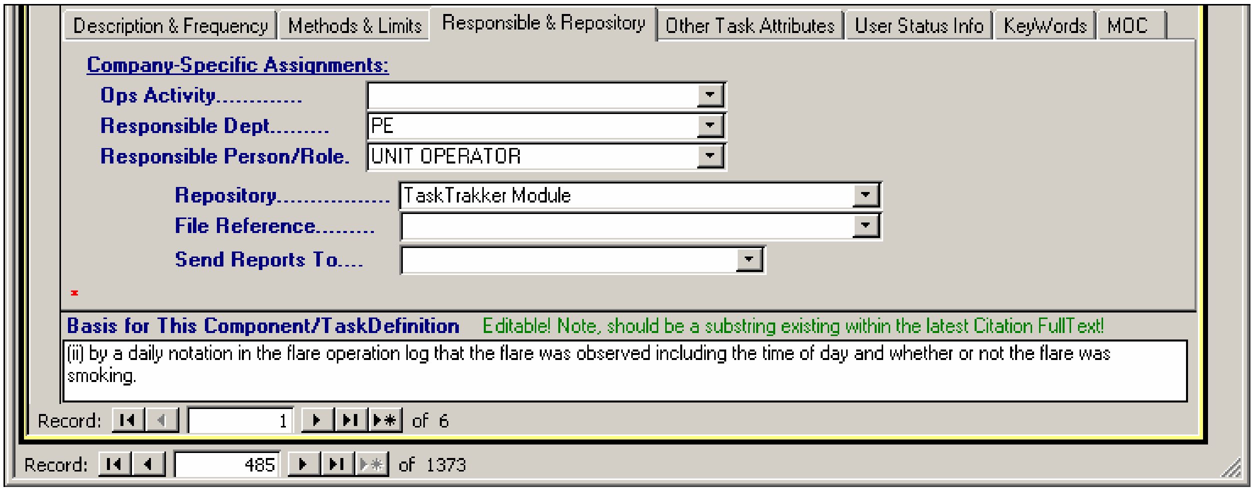
An example of a limit would be if the text said to "maintain a minimum control efficiency of 90%". The Operator would be >=, the Limit would be 90, and the Unit of Measure would be %.

If you are attempting to put more than one Unit Measure or more than two Limit elements, it is likely that you should break the task into multiple tasks, one for each of the Unit-measure and limits that you are required to comply with.

Select the *Limit* or *Unit Measure* from the dropdown, or enter the required value.

B4d. Responsible/Repository Attributes

Enter Task attributes for Responsibility at the **Responsible & Repository** tab group window as shown below:



Ops Activity allows you to associate tasks with Operational Activities already being performed that might cover several different regulatory requirements or tasks. One of these might be a Unit Walkthrough where several things are checked during this time.

The *Responsible Department* is the department which has the responsibility for this task being completed as required such as Environmental, Operations, etc.

The *Responsible Person/Role* is a category such as Unit Operator, Unit Supervisor, etc.

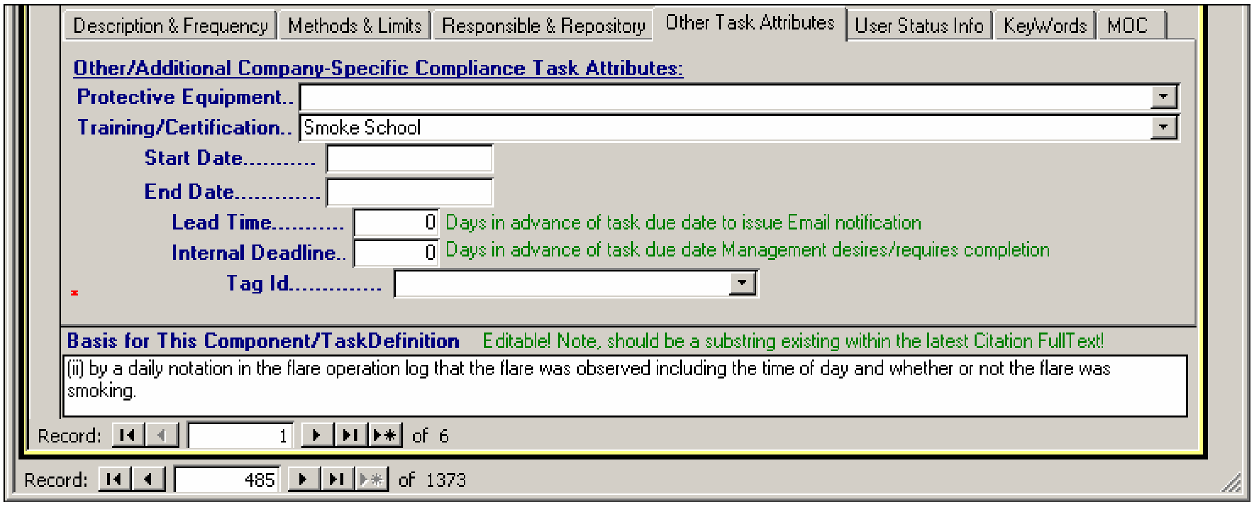
Repository is where history will be stored for this task such as TaskTrakker, paper files of logs, external database, etc.

File Reference identifies any external file that amplifies or provides any additional information regarding the compliance task.

Send Reports To identifies the role of the individual to whom reports are to be sent. Note that in the compliance management system, the role identifier may be replaced by a specific person's name and/or email information.

B4e. Other Task Attributes

Enter Task attributes for *Protective Equipment, Training/Cerfitication, Start Date, End Date, Lead Time, Internal Deadline,* and *Tag Id* at the **Other Task Attributes** tab group window as shown below:

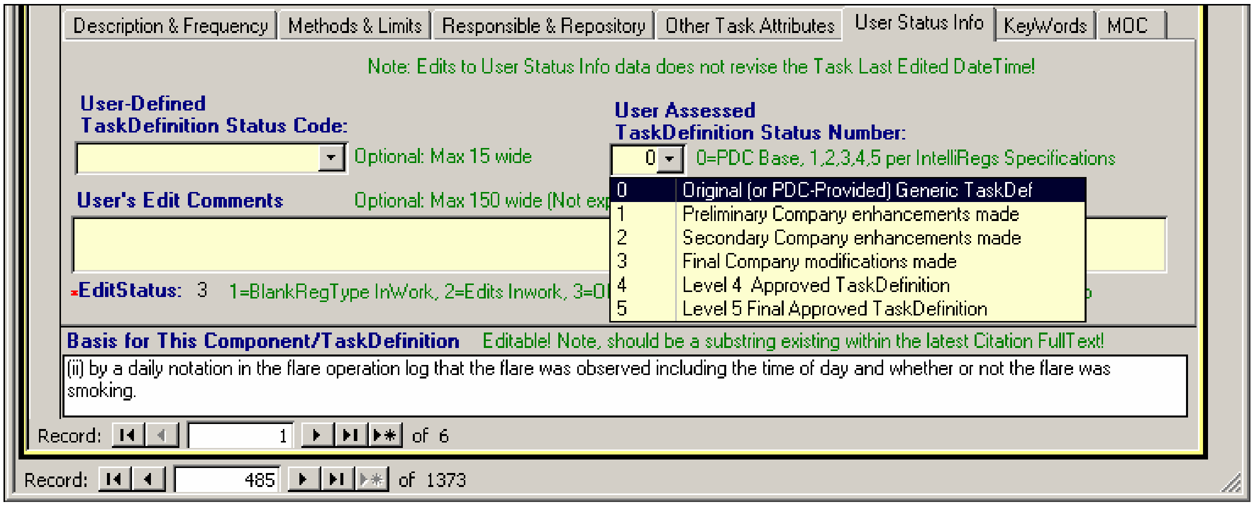


The **Training/Certification** field allows users to enter requirements for performing this task.

Note that the *Start Date*, *End Date*, *Lead-Time*, and *Internal Deadline* fields require typed-in data entry. Other fields offer optional typed-in entry, or selection from a user developed “on-the-fly” dropdown list.

B4f. User Status Info

Three "User Status Info" fields provide for User-Custom annotation of Component/Tasks to provide for special selection from the Advanced Component/TaskDefs screen. (See instructions for that screen in this User's Manual featuring these User Status Info fields for selection criteria selection.



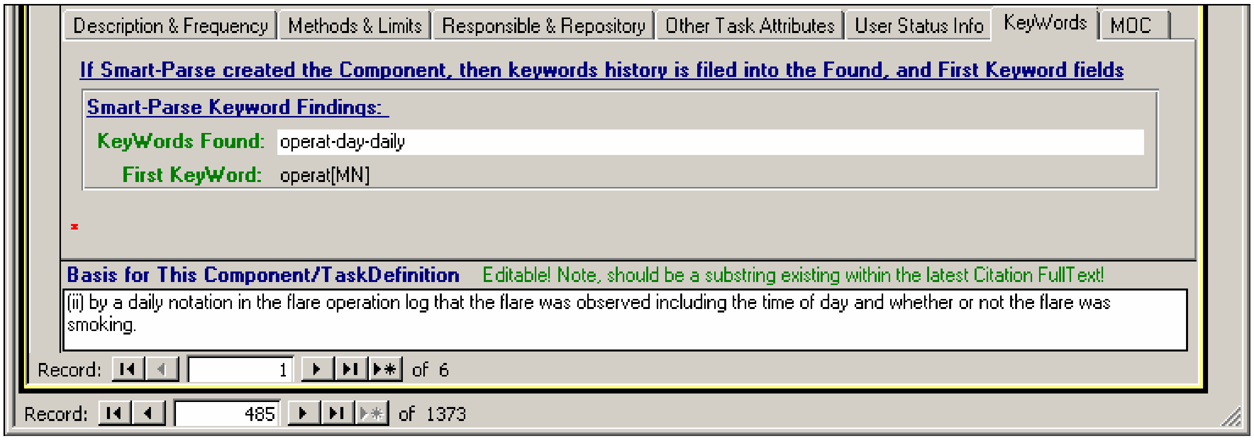
1.) Users may employ these custom fields in ways including, but not limited to, the following:
    Assignment to Role/Person for review/action: Enter name or role into TaskDefinition Status Code

2.) Track review and approval status for Company-Customized task definitions using the User Assessed Status Number. Note that Advanced Component/TaskDefs enables selection by <=, > etc. for this numeric field.

3.) Enter key words into User's Edit Comments to enable special selection of tasks such as [Flare] or [RCRA] or [SouthPlant] or [RequiresMOCPreView]

B4g. Key Words

The Key Words offers a review of the key words found based on the selections made at the **Review/Edit Keywords** screen.



The *SmartParse Keyword Findings* data is read-only, and reports all keywords found within the broken-out Component/Task text. In the example screen shown, note that a number of keywords were located within the task text. This indicates that a number of attributes will probably be entered for this Task. Note also that the highest ranking keyword “inspect” is a monitoring keyword, so the task was initialized by the SmartParse process as a Monitoring task. Of course, the Task Type can be changed if needed!

B5. Advanced Task Definition Operations

Optionally you may choose the Advanced Task Definition Operations rather than use the Component/Task screens shown in Section B4.

Use B4: To Add Task Definitions such as add sequence 04 task when 3 are existing.

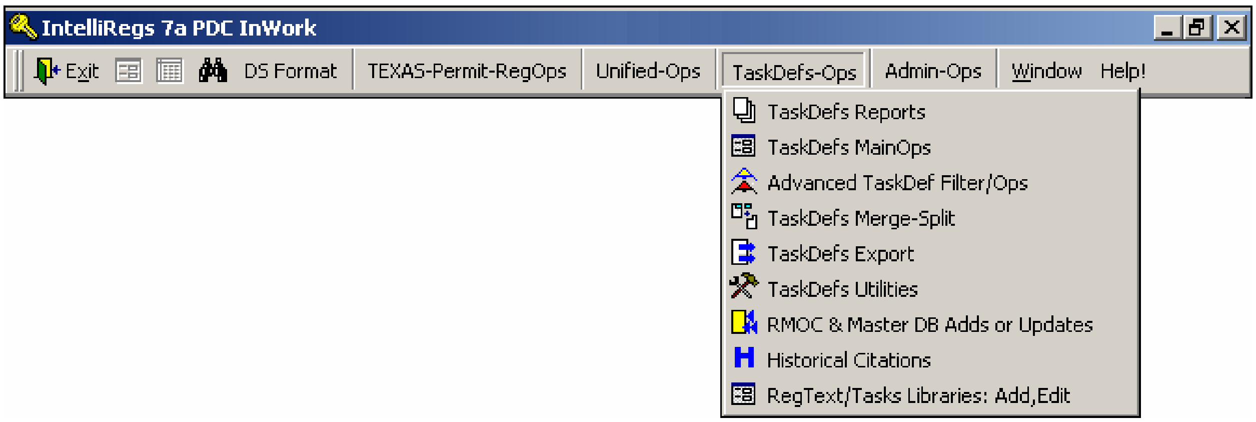
Use B5: 1.) When selection of Tasks by property values is important to focus changes or reviews on particular citations. To refine tasks as Company-Custom tasks.

2.) When SQL-type changes are to be made over more than one Task definition.

3.) To employ user comments and codes in the selection and/or updates of tasks.

4.) To designate Task definition status and select or report based on that status.

The *Advanced TaskDef Filter/Ops* screen is accessed from the TaskDefs-Ops menu.



General Filter, Update, Edit Ops Screen procedures

The Advanced Citation Task Definitions Filter, Update, Edit Ops are initiated by selection of the **OPEN FORM Components/TaskDefs** button after optionally specifying selection conditions for the tasks or proceeding with no selection conditions (Filter OFF, Review All).

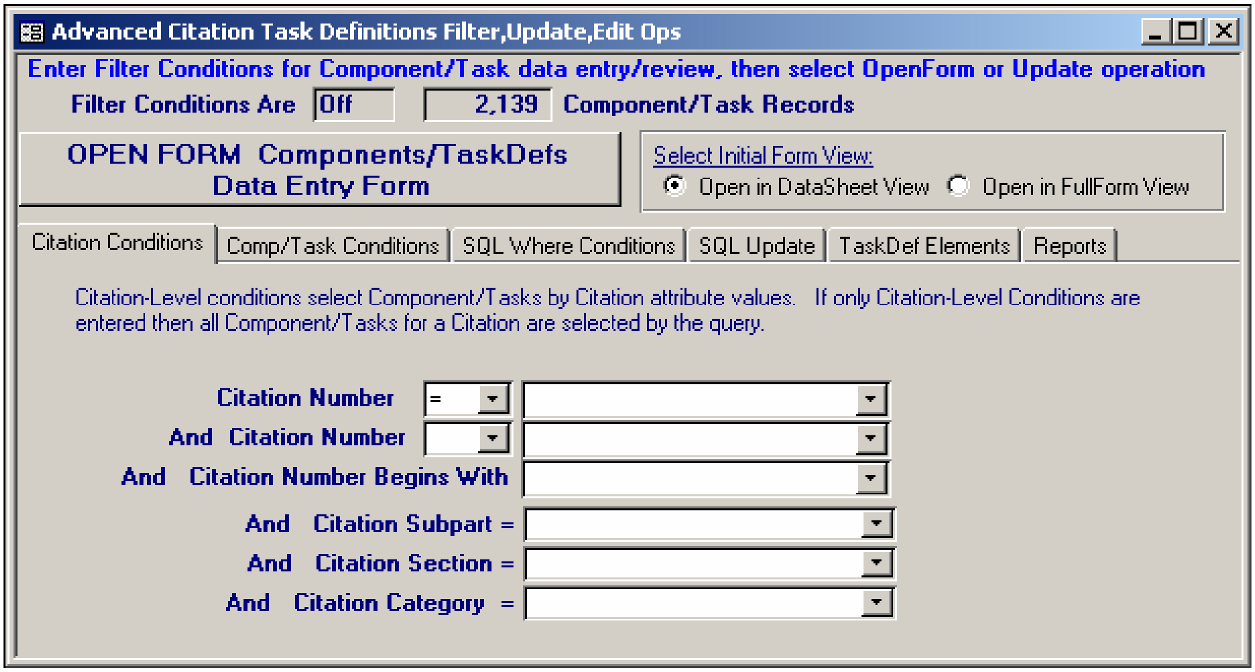
Simple or complex selection conditions may be specified or a SQL Update and/or Reports can be run. The operations are presented on 6 tabs which are each reviewed in this section of the Users Manual.

You need to move your cursor to a different cell or press the ENTER key after entering a value in order for your designated filter/selection condition to be applied. A change in the Filtered Condition as ON/OFF and a revised number of specified Component/Task Records will be displayed following entry of your new conditions. Of course a count of 0 indicates that no Component/Tasks meet your specifications.

The dropdowns and data entry cells provide for simple selection specifications, which may satisfy most selection requirements. For compound selection criteria or complex specifications you may use the SQL Where tab. (See separate instructions and information in this User's Manual)

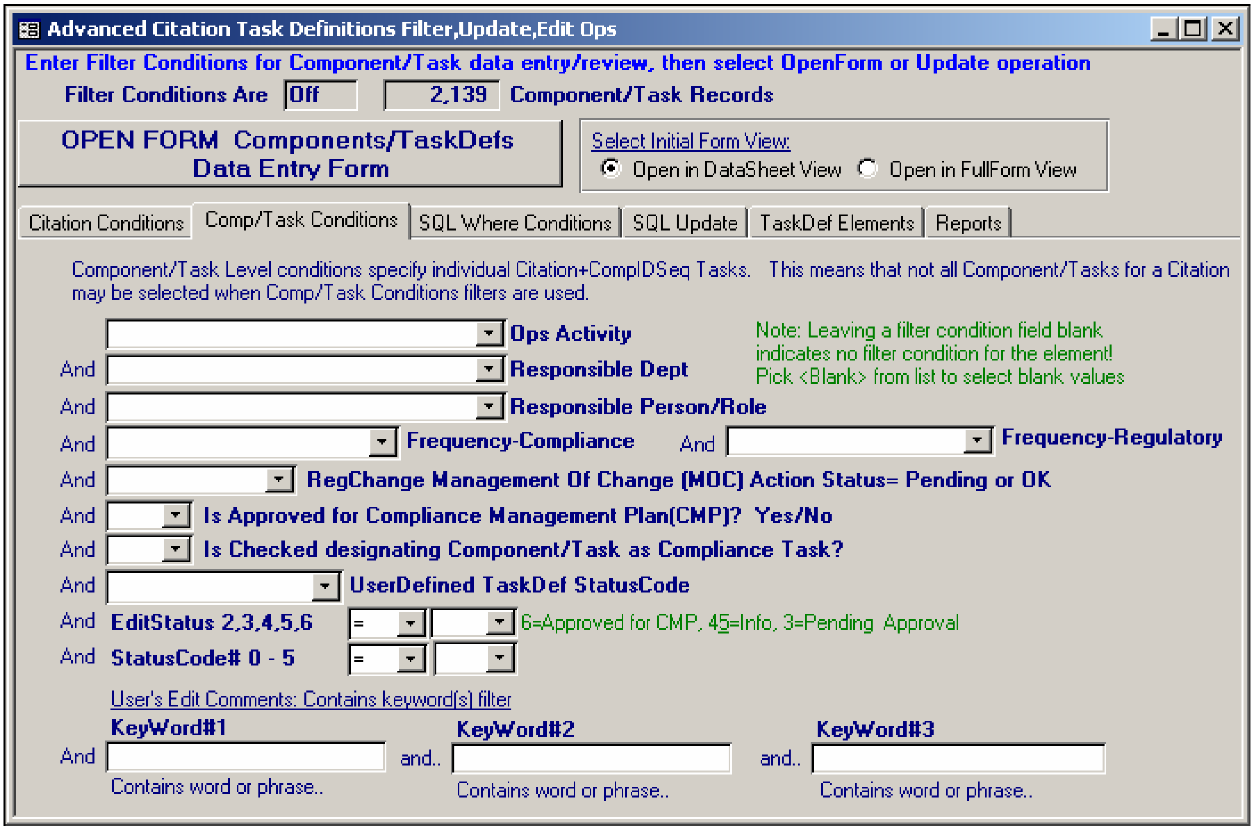
B5a. Citation Conditions Tab

The **Citation Conditions** tab provides selection of specific value conditions for filtering the Component/Tasks to be edited/reviewed. Note that the Citation Number cells provide for a quick, convenient procedure to specify a specific Citation Number, a range of Citation Numbers (>= and <= and the Citation Numbers) or enter the beginning Citation Number characters.



B5b. Comp/Task Conditions Tab (Component Task-Definitions)

Similar to the Citation Condition tab, the **Comp/Task Conditions** tab provides dropdown and data entry cells to enable selection specification for Component/Tasks to be quickly entered.

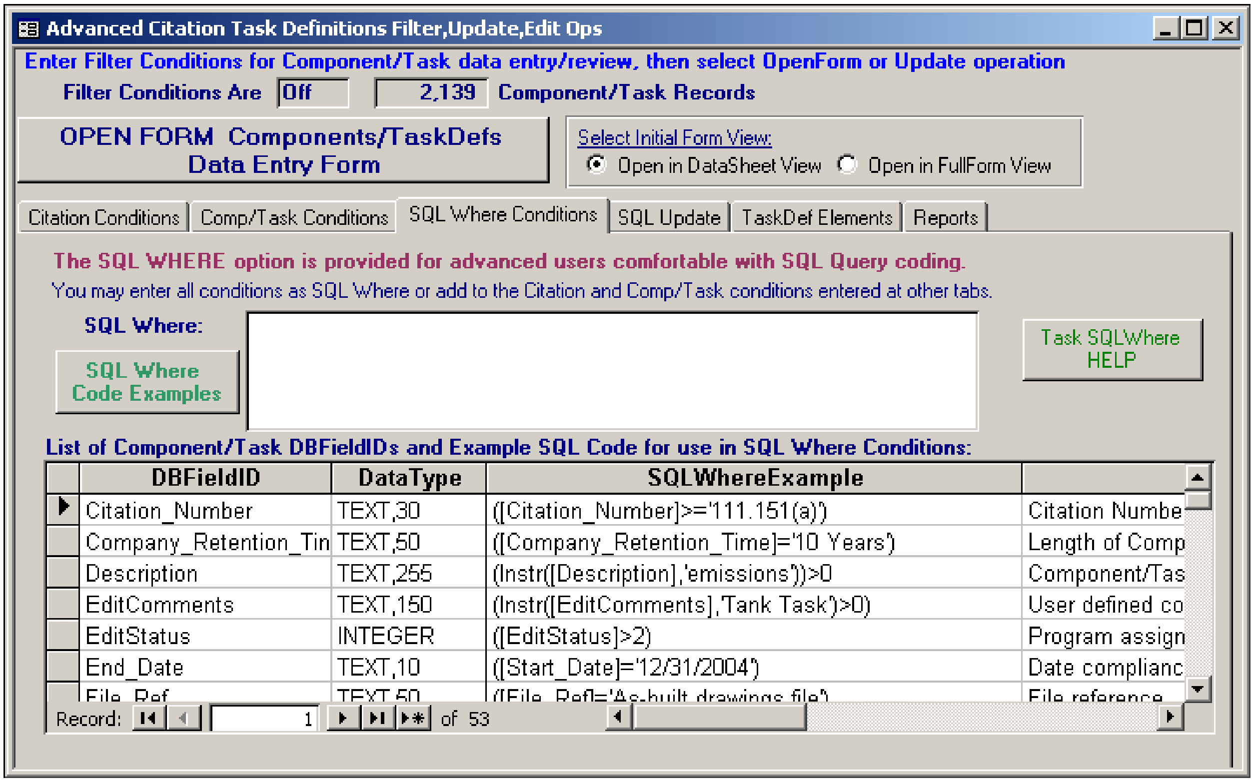


It is suggested that you learn the power and flexibility of these selection screens by entering a variety of conditions and assessing the resulting selected Component/Tasks.

Dropdowns for Comp/Task Conditions list current values for the respective attribute in your database. No selection other than the offered values should be entered, as the result would be no Component/Tasks satisfy the condition.

B5c. SQL Where Conditions Tab

The **SQL Where Conditions** tab provides for multiple-task selection for conditions which are not able to be defined using the **Citation Conditions or Comp/Task Conditions** tabs. Users familiar with Microsoft MSAccess/Visual Basic SQL language or other SQL languages will find this a powerful option for selection of desired Component/Tasks.



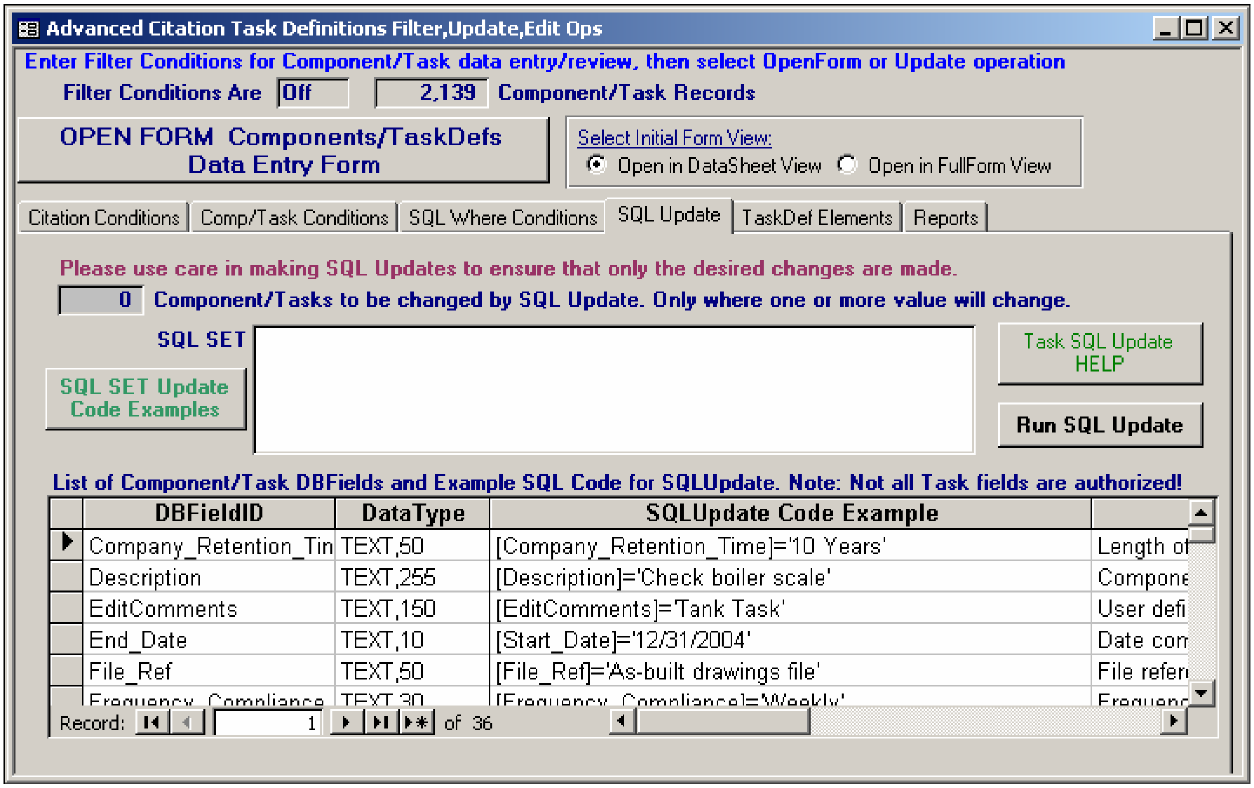
To assist in the development of your SQL Where value a list of IntelliRegs Component/Task field ids and example SQL Where code is provided in a subform. Cut and paste from the SQL WhereExample code into the SQL Where work cell and revise that code as required for your selection needs. In addition, refer to the SQL Where Code Examples, which you can also cut and paste from and then edit the code as needed.

Please note that SQL Where conditions are very sensitive to correct spelling of DBFieldID, balanced parentheses, enclosure of strings with single quotes, and other SQL conventions. The IntelliRegs program will perform a review of your SQL code and identify major errors that must be corrected before the SQL Where code can be successfully applied. Follow the examples closely and your SQL Where code should select the desired records. Contact PDC for additional assistance and instructions on use of the SQL Where.

You may select the SQL Where **HELP** button during use of IntelliRegs for "during-program/online" information and instructions.

B5d. SQL Update Tab

Use of the SQL Update tab should only be made by persons experienced in SQL code or as specifically instructed by PDC.



Use of the SQL Update option enables data value updates to be made to one or more Component/Task Definitions:

1.) Specific conditions/selection at the **Citation Conditions**, **Comp/Task Conditions**, or the **SQL Where** tab for all records to be updated.

2.) Enter the SQL update code into the SQL Set field.

3.) Select the **RUN SQL UPDATE** button to perform the update.

4.) Confirm OK at the MessageBox that indicates the number of records that will be updated. (Optionally CANCEL if the record count is not correct/as desired)

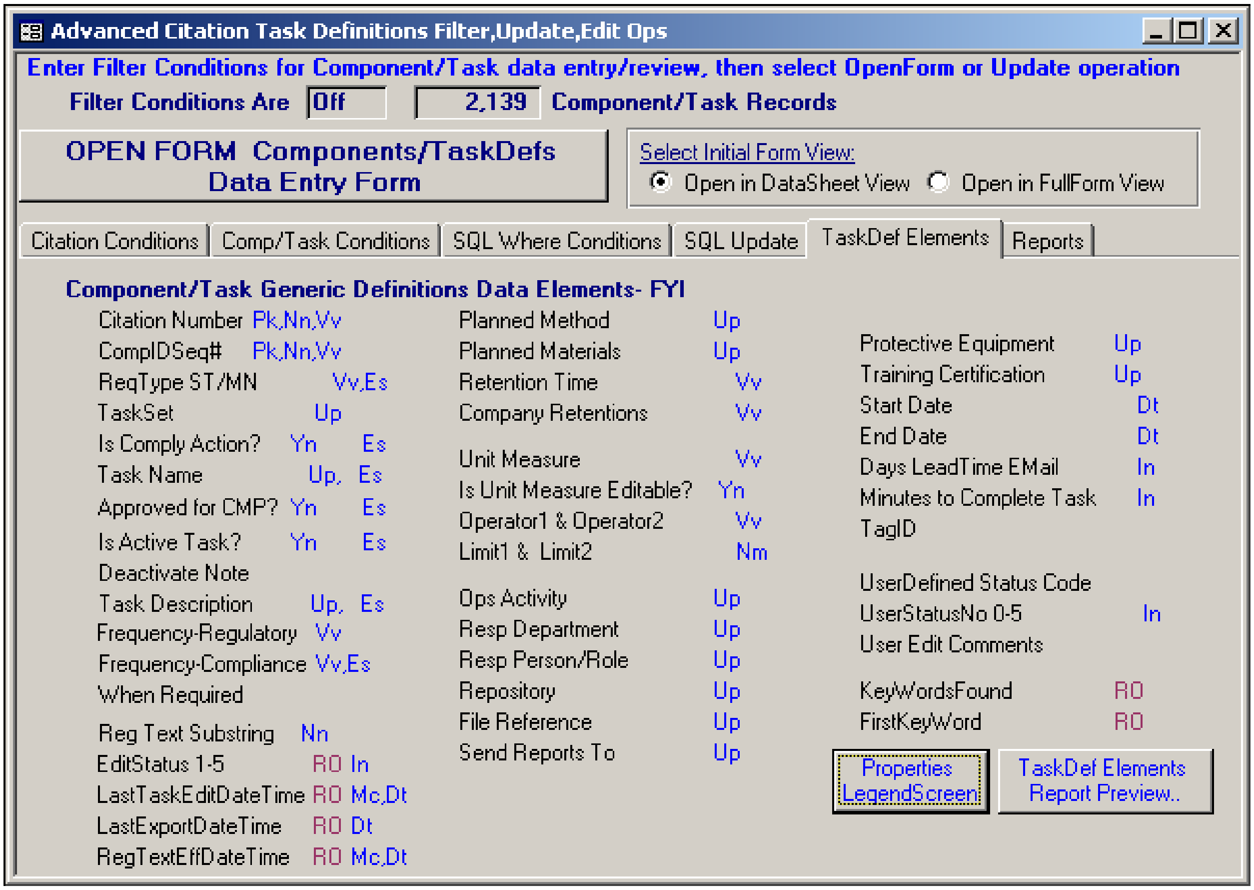
IntelliRegs Component/Task field IDs are identified in the DBFieldID in the subform. Example SQL Update Code is provided which can be cut-and-pasted for each DBFieldID. During use of IntelliRegs select **TASK SQL UPDATE HELP** for information and instructions.

CAREFUL!!!! Updates made using SQL UPDATE cannot be reversed so be very certain of the changes before running them.

B5e. Task Def Elements Tab

The **TaskDef Elements** tab presents information on each Component/Task attribute. Please refer to the additional information available by selection of buttons on this tab:

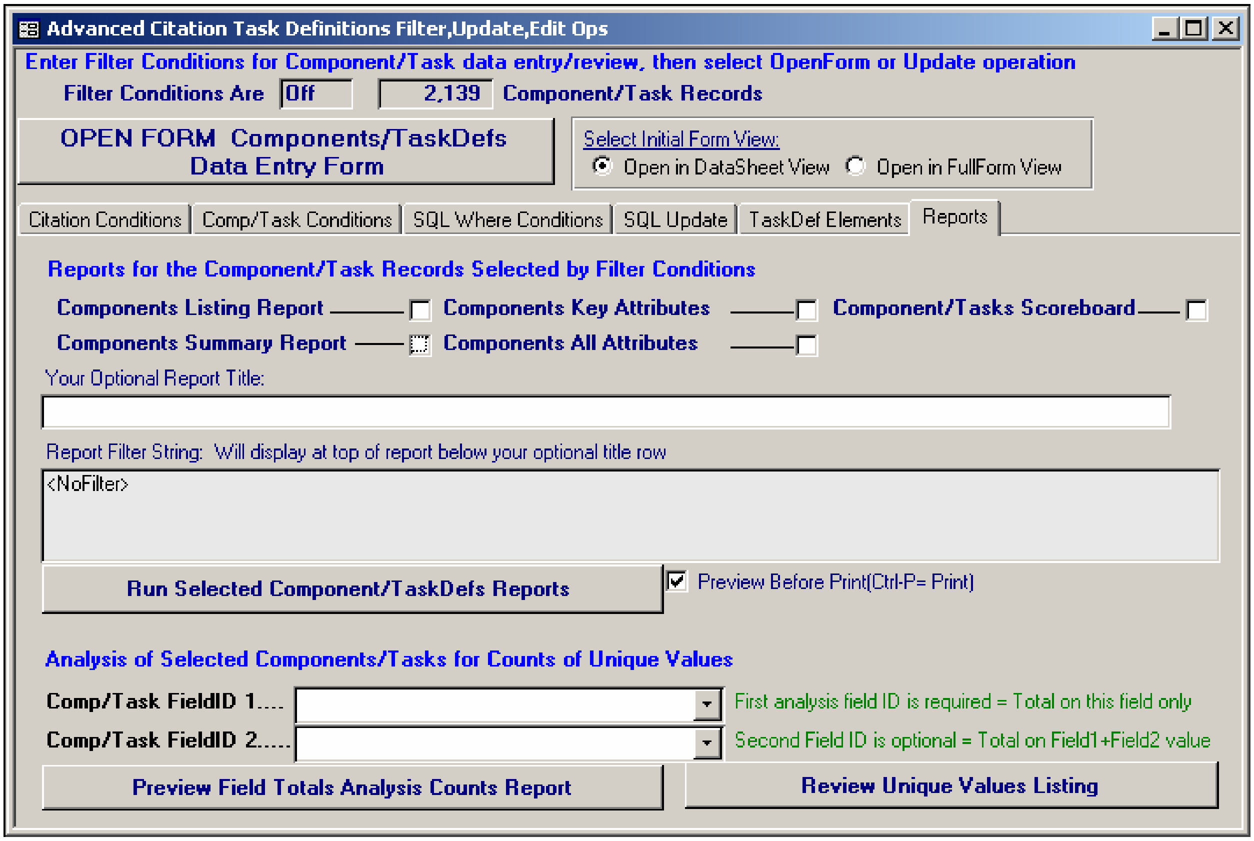
Properties Legend Screen: Information on the Pk,Nn,Vv,..etc. codes displayed for attributes on the TaskDef Elements screen.



TaskDef Elements Report Preview: Preview and optionally print a report of the Component/Task Definition attributes.

B5f. Advanced Citation Task Definitions... Reports Tab

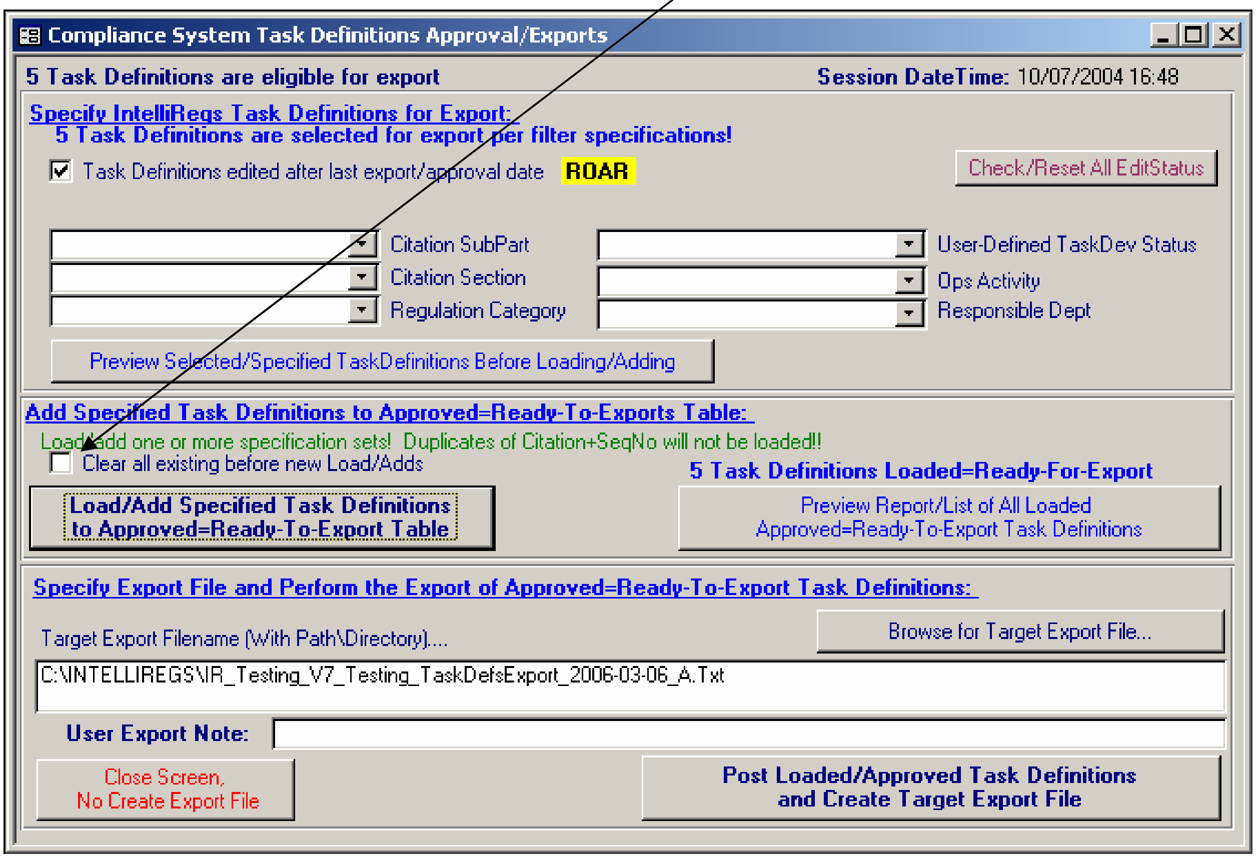
Five report formats are available for the Component/Task Definitions specified for selection. Each report displays the selection criteria and the Optional Report Title.



*** Optionally also perform analysis of Selected Component/Tasks for unique counts and listings.**

B6. Export Tasks Data To Compliance Management Program (CMP)

Tasks are exported for use in TaskTrakker from the *TaskDefs Export* selection on the *TaskDefs-Ops* menu. The created ASCII Text file is readable by TaskTrakker or other Compliance Management systems. You may elect to export only tasks that have been edited since your last export, or all task definitions in current TitleV Applicability database. Optionally, you may choose to export by Citation SubPart (60Kb), Citation Section (60.112b), Regulation Category (NSR), User-Defined TaskDev Status defined on the Status & Comments Tab of the task, Ops Activity, or Responsible Department. You may Preview a List of the Specified TaskDefinitions that have been selected to be exported. Check the **Clear all existing before new Load/Adds** checkbox if you want the export file to contain only your current selection. Multiple loads may be added into the same export file by leaving this box unchecked.



After these selections, select the **Load/Add …** button. You may then Preview a Report/List of All Loaded Approved=Ready-To-Export Task Definitions.

Designate the file path and filename of the text file to contain exported tasks to the CMP in the *Target Export Filename* data cell on the Main Screen. The directory must exist and the filename must end with .txt. The first time a file is exported it will have the current date and the letter A. Subsequent exports done on the same day are identified with the same date and B, C, etc. A *User Export Note* is required. Enter it into the box provided.

You can create the file on a disk, if desired, and name the file as desired.

Example of create on diskette in drive A:

a:\PDC_Tasks_To_TaskTrakker.txt

After the ExportFile directory and name and User Export Note have been entered, select the **Post Loaded/Approved Task Definitions and Create Target Export File…** command button.

When the file is created successfully, a message will confirm completion and indicate the number of task records exported.

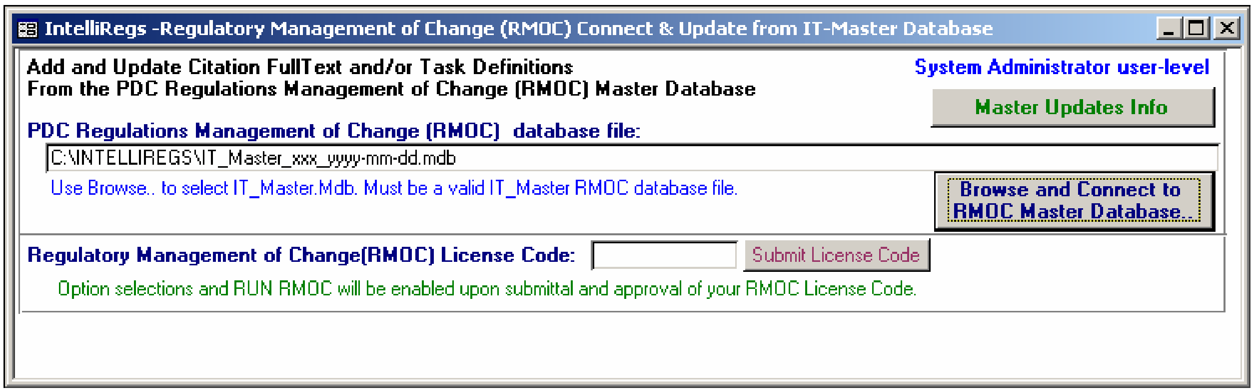
An ASCII, tab delimited, file is created meeting specifications for CMP import. This file should not be edited in any way prior to use in the CMP import process.

Run TaskTrakker to Import the IntelliTask Tasks: Using the TaskTrakker program, select the *IntelliRegs* icon from the menu bar, then select *Import Tasks* and designate the .txt file created by IntelliRegs. Select *Load File* and run the *Import Tasks* to populate TaskTrakker with tasks.

B7. Import Master Data and Regulatory Management of Change (RMOC)

Use of the IntelliRegs-Regulatory Management of Change (RMOC) screen is by licensed subscribers to the PDC Regulatory Management of Change RMOC) service. Each licensee is provided a License Number that is entered to authorize screen operations.

Select ***RMOC & Master DB Adds or Updates*** from the ***TaskDefs-Ops*** menu to open the **Regulatory Management of Change (RMOC) Connect & Update from IT-Master Database** form.



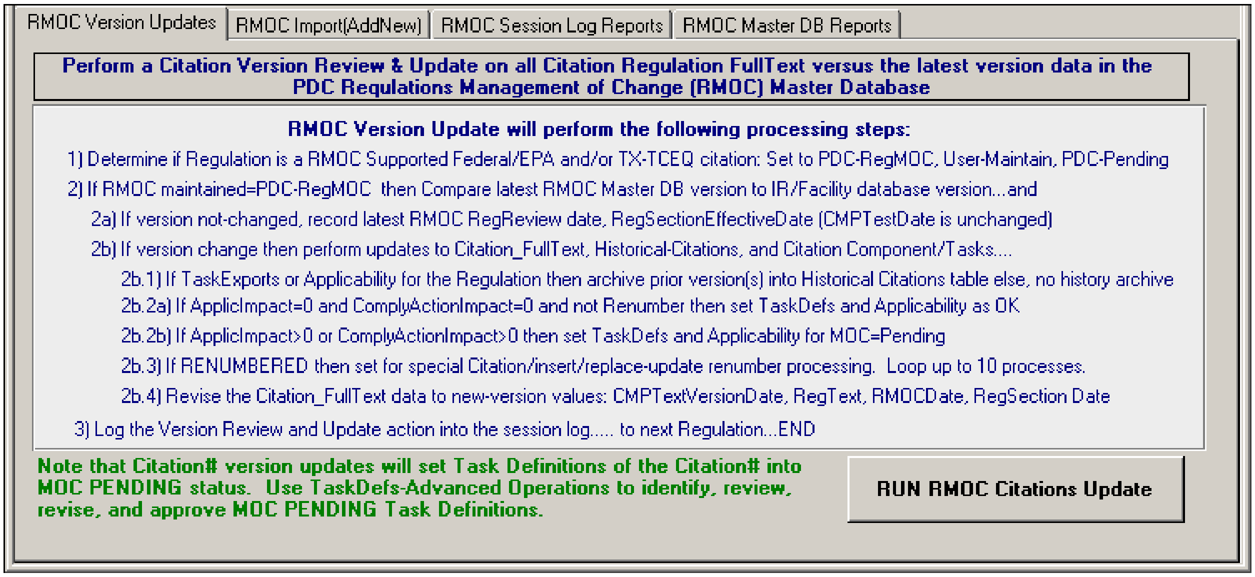
Designate the *Regulations Managenment of Change (RMOC) database file*: Select an IT_Master*.mdb datafile using the **Browse…** command button. All Master files begin with IT_Master, are MDB files, and must already exist. Upon selection, IntelliRegs will verify the file is a Master datafile and if so will link to the required Master data tables within that datafile.

> **Note** that only the latest version of the PDC Regulations Management of Change (RMOC) database file should be used. IntelliRegs registers the RMOC database versions and latest used to prevent accidental connection to a prior version.

You must then enter your License Code as provided by PDC and select **Submit License Code** to enable updates. After your entered RMOC License Code is approved then all of the tables from the Regulations Management of Change (RMOC) are linked/connected and registered to your IntelliRegs program. The linked RMOC tables will be referenced during use of the Citation FullText data entry form as well as during the operations performed at the various tabs on this form. The operations at each tab are reviewed in this section of the Users Manual.

RMOC Version Updates

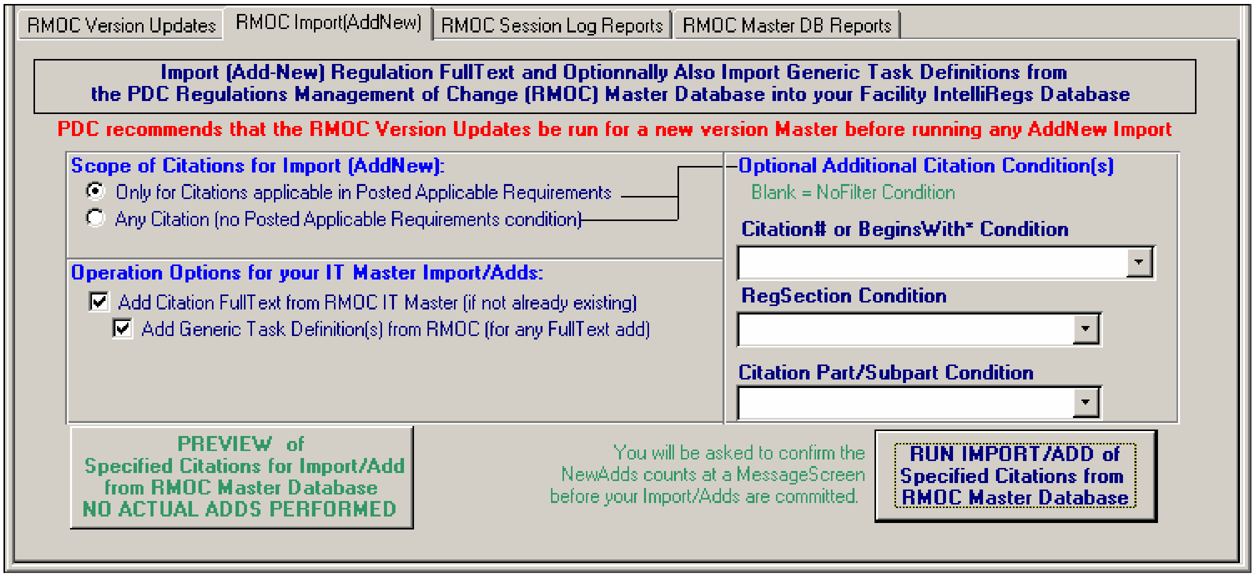
General Procedures for RMOC Version Updates



IntelliRegs updates of Citation Full Text from the RMOC Master Database is simply run by selecting the **RUN…UPDATES** button. If updates are needed then they will be performed, if no updates are required, then a "No Updates Required" message will confirm that all Citation Full Text is the latest version.

The operations of the RMOC Update are presented in summary at the **RMOC Update** tab screen as shown above. Each RMOC Update session is logged and the log data available for review and reporting from the **RMOC Session Log** tab.

The **RMOC Import(AddNew)** tab allows you to add citations and tasks from PDC's Master RMOC Library Database.



General Procedures for Import(AddNew) from RMOC Master Database:

1.) Specify Scope, Operation Options, and/or Optional Additional Citation Condition(s)

2.) Preview specified citations to confirm proper selection

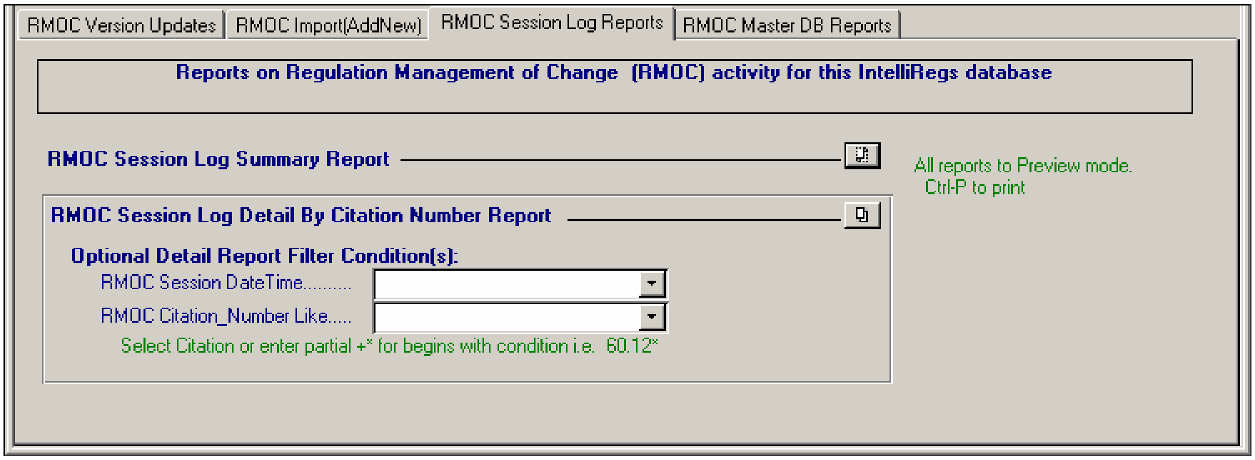
3.) **RUN IMPORT/ADD** to perform the Imports

The import of PDC-Developed Generic Task Definitions is optional only when Citation FullText is imported from the RMOC Master database. The generic tasks can then be tailored to become company specific. f you choose to add only the Full Text, you cannot add the PDC-Generic tasks for those Citations at a later date.

You can choose to add only citations for which you have applicability already established, or any citation(s), Regulatory section (60.110b), or Regulatory subpart (60Kb) for which you might establish applicability in the future.

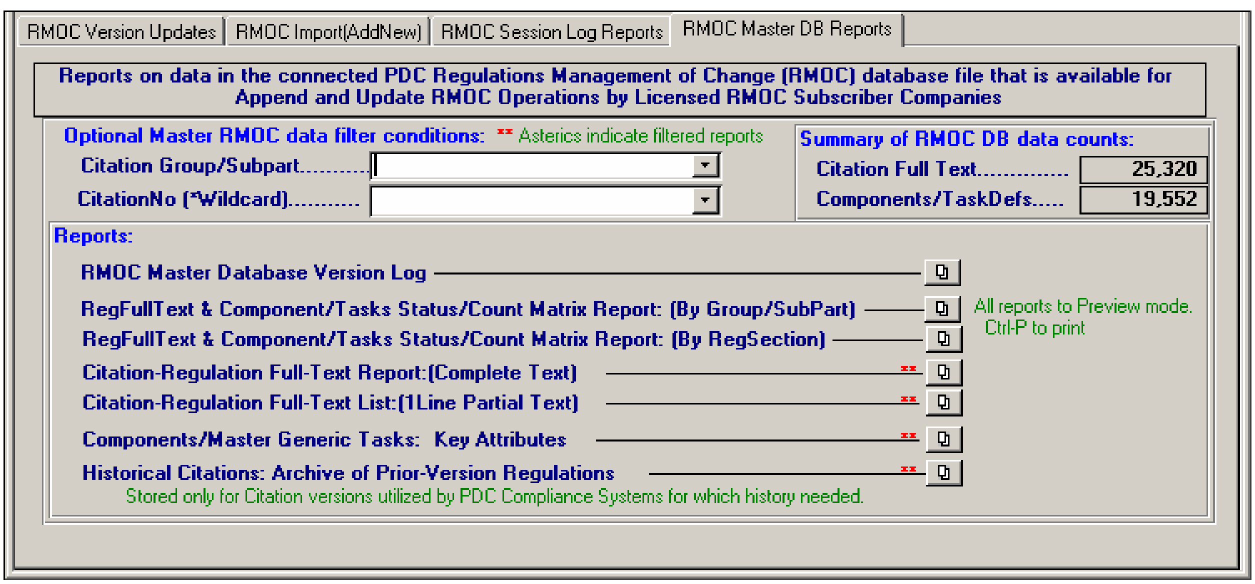
RMOC Session Log Reports and RMOC Master DB Reports tabs

Preview and optionally print Session Log and Master DB reports as required.



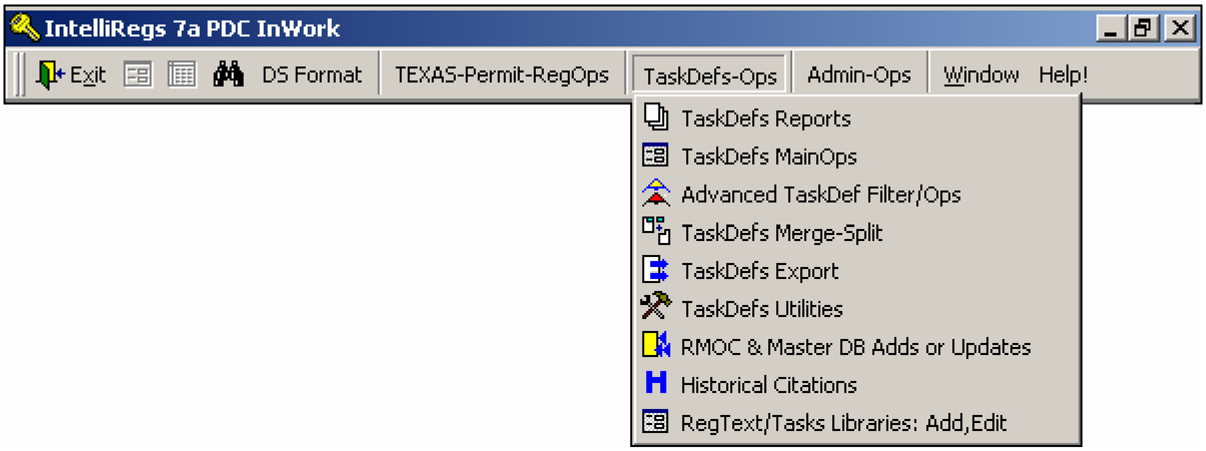
The *RMOC Master DB Reports* enable review of the contents of the Master database before/without importing data into your IntelliRegs database.

> **Note:** Historical Citations data in the RMOC Master Database is only imported during the RMOC Version Update process if applicability has been established or a Task Definition has been exported for a revised Citation.



C. Task Definition Menu Bar Selected Operations:

This section of the User's Manual reviews Task Definition operations selected from the IntelliRegs Menu Bar. These selections are made from the drop-down list available at the *TaskDefs-Ops* menu item.

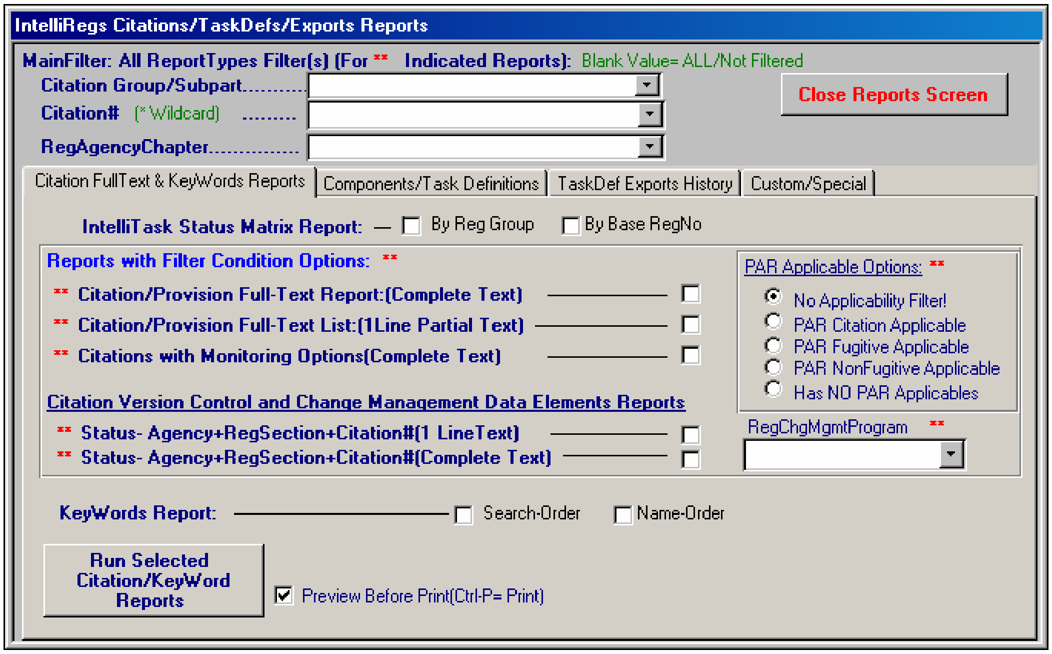


> **Note:** See **Section 4: B** of this User's Manual for the *TaskDefs MainOps* selection, Task Definition Main Screen. Other drop-down selections, *TaskDefs Reports*, …*TaskDefs Merge-Split*, and …*TaskDefs Utilities* are covered in the following paragraphs.

See **Section 1** of this User's Manual for review general IntelliRegs Menu Bar selections connection, form view, datasheet view, Find, DS Format, and Help!.

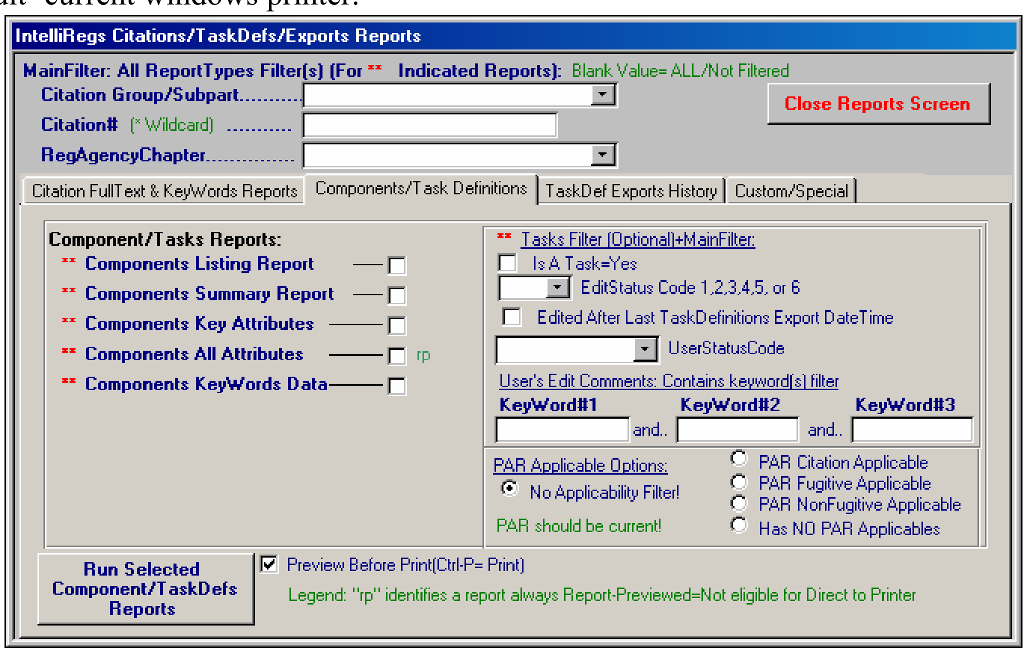
C1. Reports

Select *TaskDefs Reports* from the IntelliRegs *TaskDefs-Ops* menu bar to use the ***Task Definitions Reports*** form.

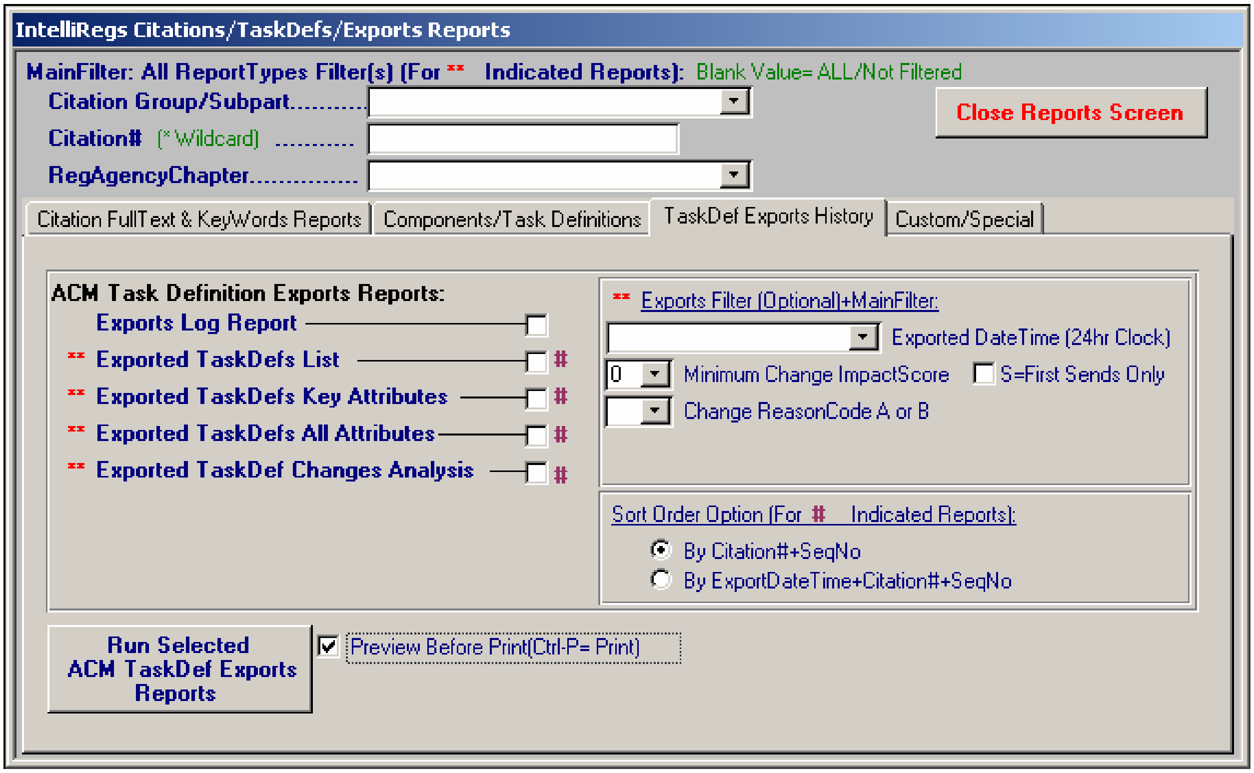


See **Section 5**, Task Definition Attachments, for example reports generated from the ***Task Definitions Report*** screen.

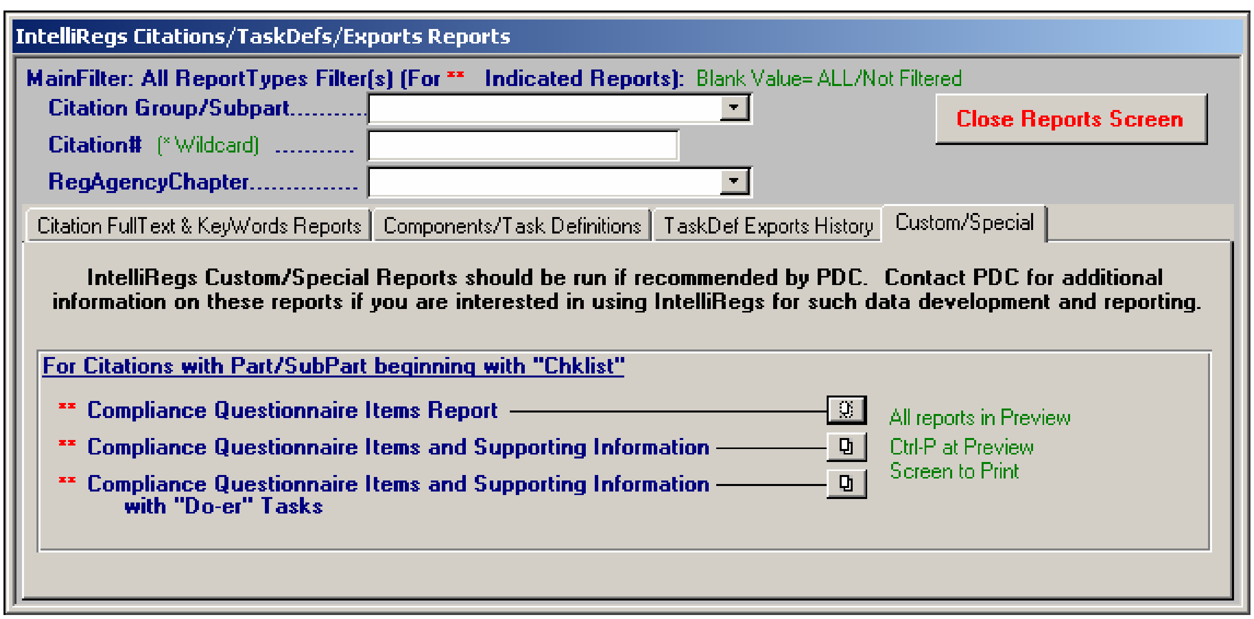
Note: The report generator will print all selected reports. If the *Preview Before Print* is checked, then the reports will appear for screen preview. At screen previews, press the **<Ctrl>** key and the letter **P** at the same time to prompt the print selection screen. If the *Preview Before Print* is not checked, then selected reports will be sent directly to the default=current windows printer.



The *TaskDef Exports History* shows when tasks have been exported from IntelliRegs as a log of date/time or a list of citation numbers with or without attributes.

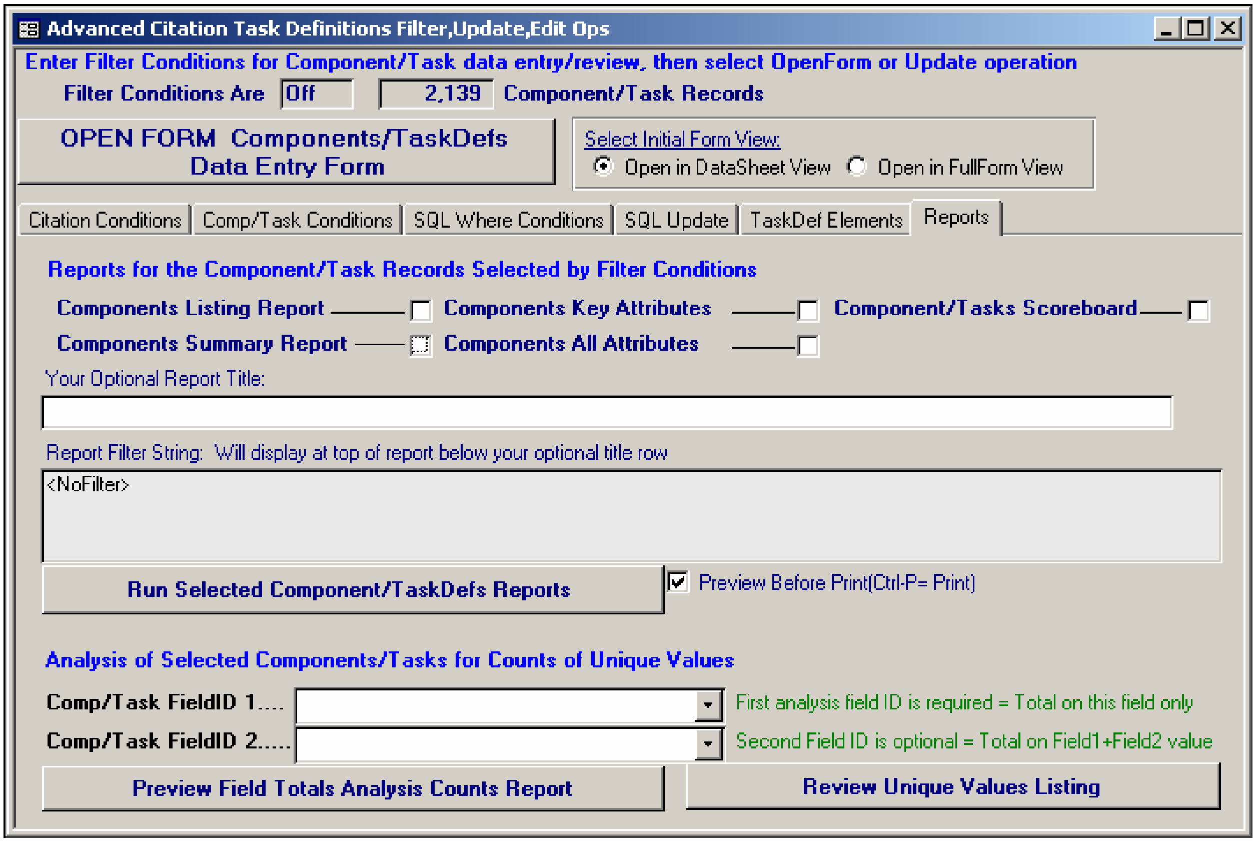


For information on *Custom/Special* Checklist reports, contact PDC for instructions on how to use this feature.



C2. Advance TaskDefs Filter/Ops

Reports filtered by conditions selected on other tabs may be run from **the Run Selected Component/TaskDefs Reports** button on this tab. Optional report titles may be entered.

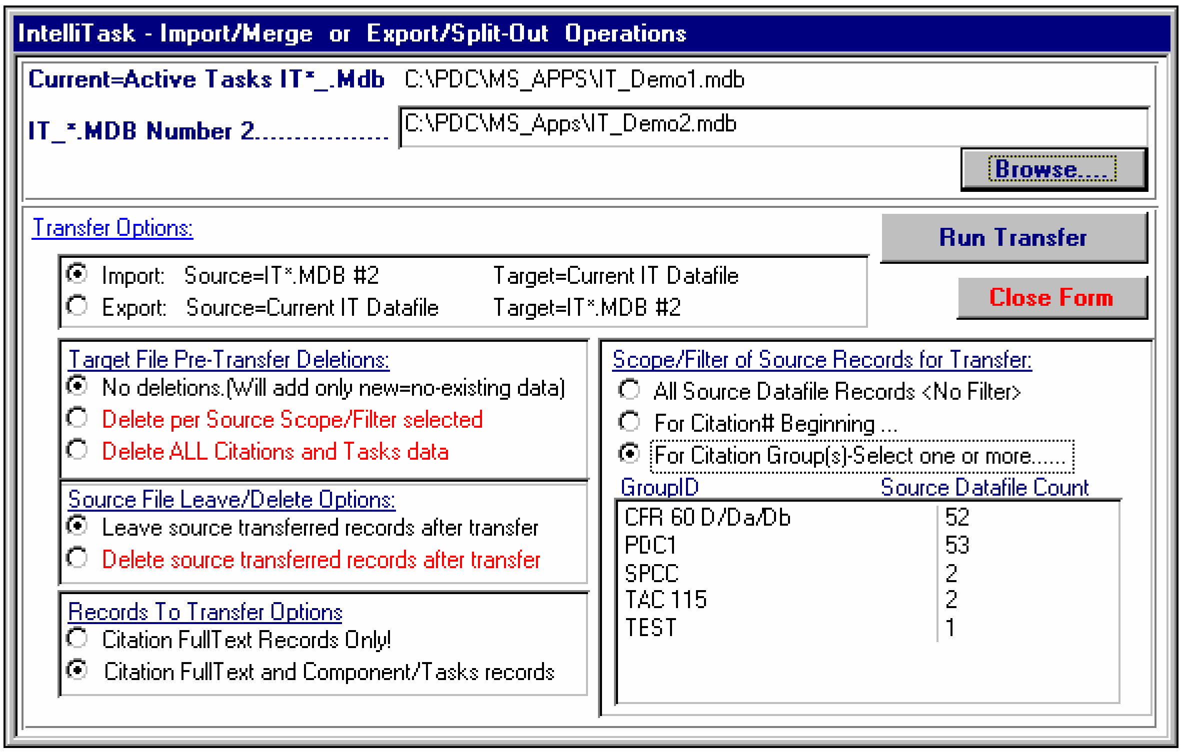


Analysis of selected components/tasks for counts of unique values may also be viewed filtered by fields in the component/tasks such as compliance frequency, planned methods, responsible department, etc.

C3. Merge-Split

Select T*askDefs Merge-Split* from the IntelliRegs Menu Bar to use the ***Import/Merge or Export/Split-Out Operations*** form.

Import/Export is used to transfer data to or from IT_*.mdb IntelliRegs Task Definition datafiles. One of the .mdb datafiles in the transfer must be the current IntelliRegs connected IT_*.mdb referred to as the "current IT Datafile". The other IT_*.mdb datafile, the Secondary IntelliTask Datafile, is identified using the **Browse…** file locate button. Transfer Options are set then… **Run Transfer**.



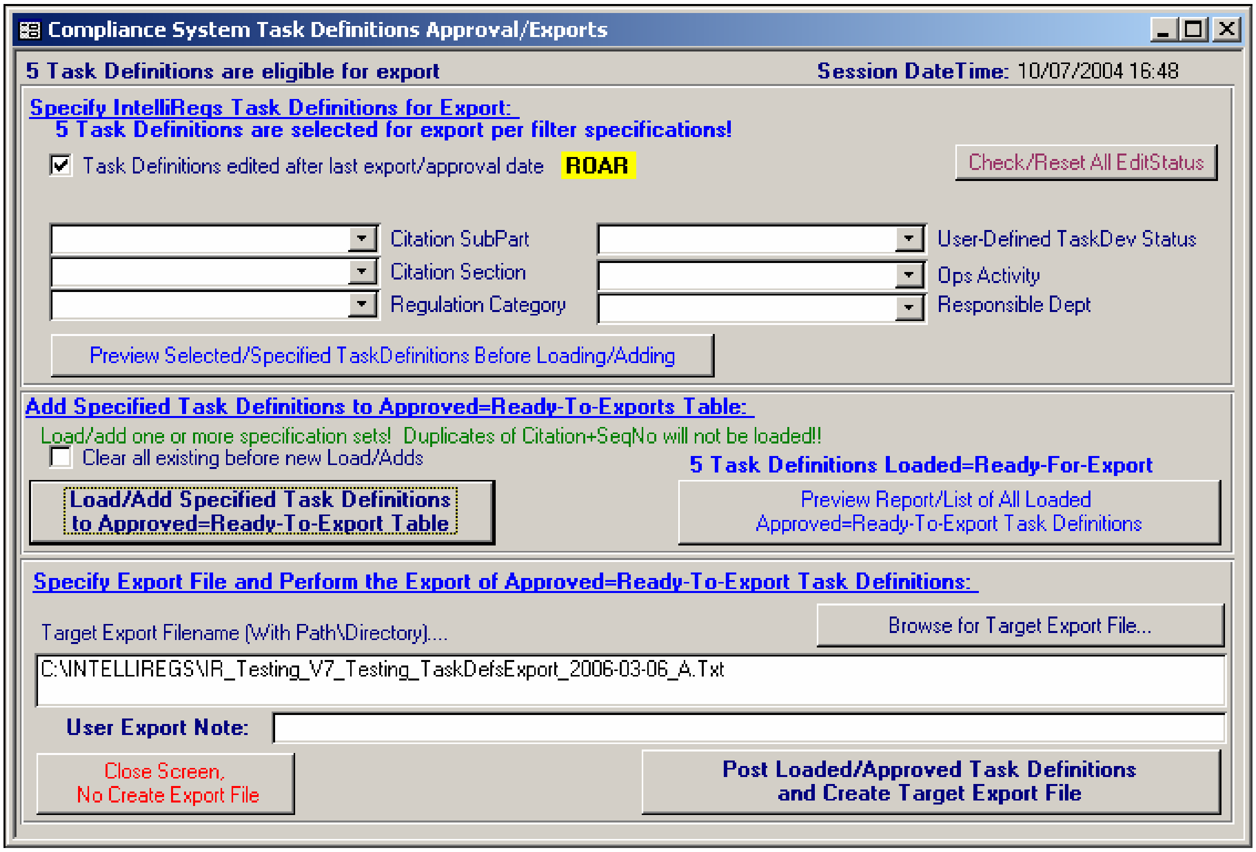
If *For Citation# Beginning…* or *For Citation Group(s) Scope/Filter* options are selected, then additional data entry/selection cells will be offered to define the criteria.

> **Note**: Using the *Scope/Filter* options, a single Citation# or set/group of citations can be import/exported. Using multiple filtered transfers, virtually any combination of Task Definition data can be transferred between different IT_*.mdb Task Definition databases.

This Import/Export=Merge/Split enables multiple data entry of Task Definitions to be easily and efficiently combined as needed.

C4. TaskDefs Export

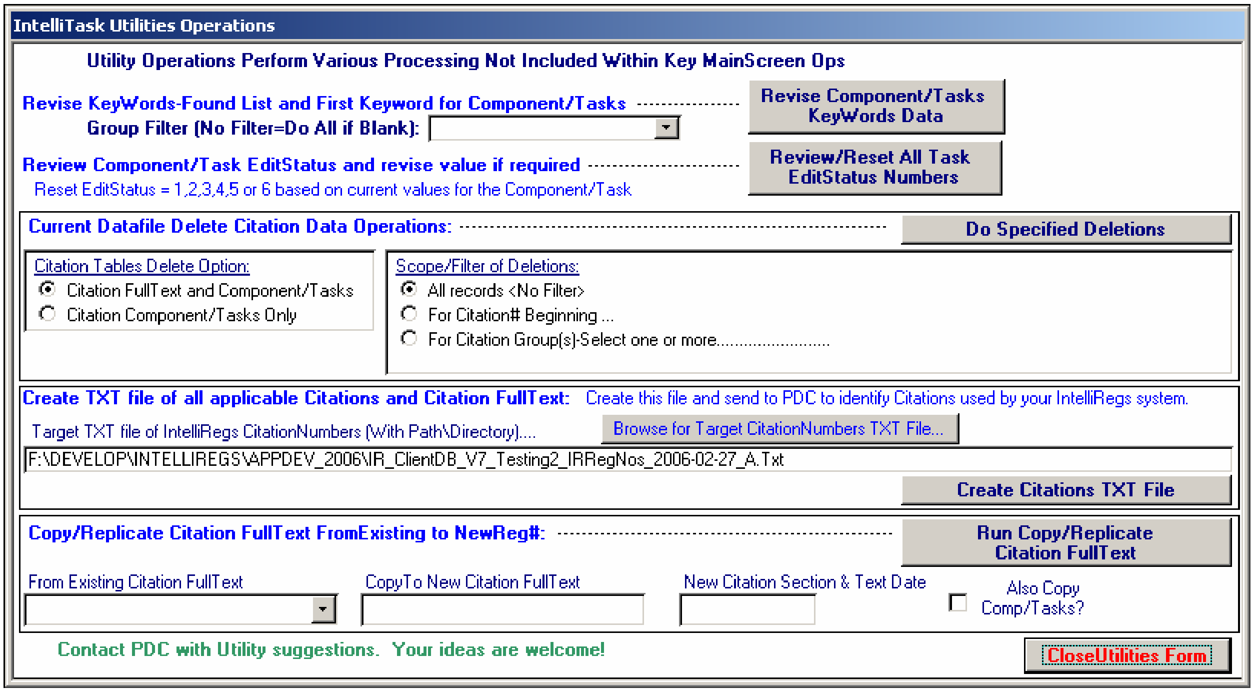
Compliance task definitions defined in IntelliRegs may be exported to a text file for use in TaskTrakker or other Compliance Management Plan system.



These tasks may be exported using several different filter criteria such as Citation SubPart, Citation Section, etc. Only task definitions that are complete and have a Status=6 Approved are available for export. You may also choose to export only those taskdefs that have been edited since the last export, or all task defs. After selecting the export criteria, load the task definitions to the Approved=Ready-to-Export Table. The definitions that have been loaded may be previewed at this time before performing the actual export. The Target Export File is provided as a default value. You may change the path of this file if desired. The file is dated with the current date and a letter identifier. Subsequent exports made on the same day will have the same date, but a different letter identifier. A User Export Note is required before performing the export.
After enter this note, run the **Post Loaded/Approved Task Definitions and Create Target Export File**.

C5. Utilities

Select *TaskDefs Utilities* from the menu bar to use the ***IntelliRegs Utilities Operations*** form.

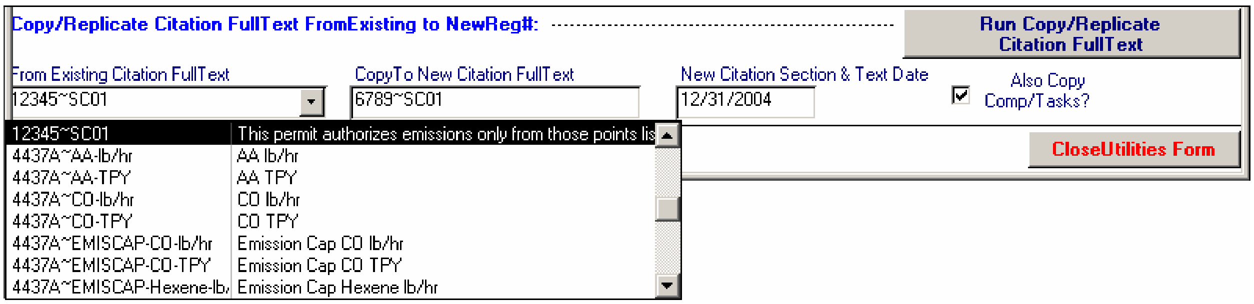


*****Utility operations cannot be reversed, so be sure your selections are correct before running the function. It is recommended that you archive your IR_*.mdb before performing any major data deletion activities.*****

Additional input cells will be offered upon selection of Scope/Filter options which require additional data entry….

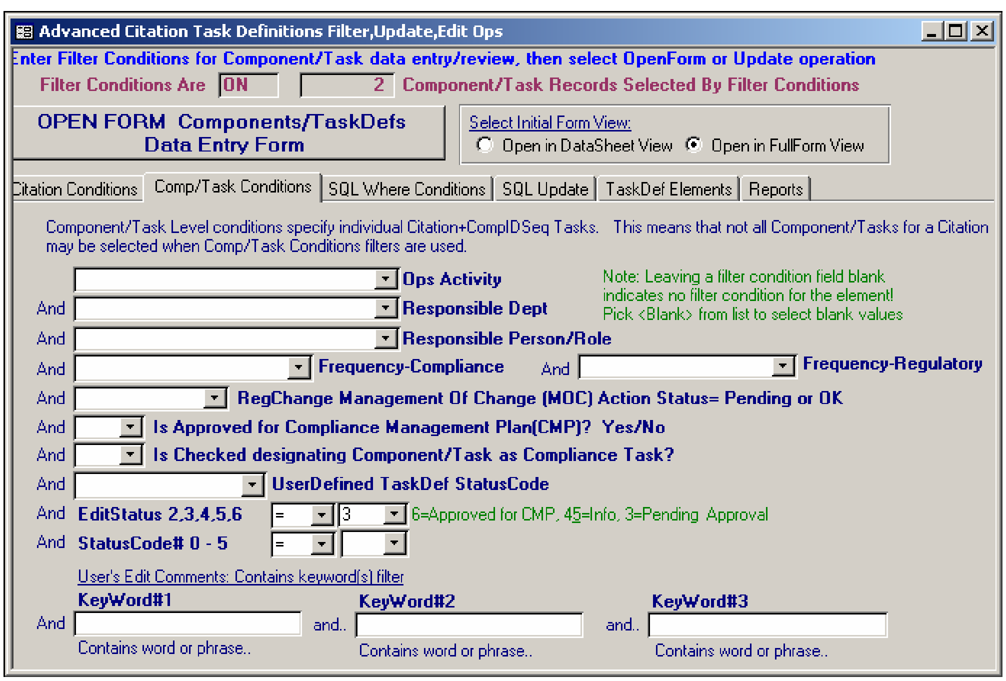
For Citation # beginning… enter the beginning citation# value.
For Citation Group(s)… Select one or more Citation Groups from a picklist box.

The ***Copy/Replicate Citation Full Text FromExisting to NewReg#*** feature allows a user to copy boilerplate NSR permit conditions, and optionally tasks, from one permit number to another. After choosing the current NSR permit condition from the drop down list, enter the new permit condition number and the new permit effective date. Then select the **Run Copy/Replicate Citation FullText** button to complete the process. You must then go to the *Citation FullText Data Entry Form* and adjust the *Regulation Part-Subpart* to the new permit number. The *Last Reg MOC Review Date* will have been set equal to the date entered. You may wish to change this to the current date to show that this permit condition has been reviewed.

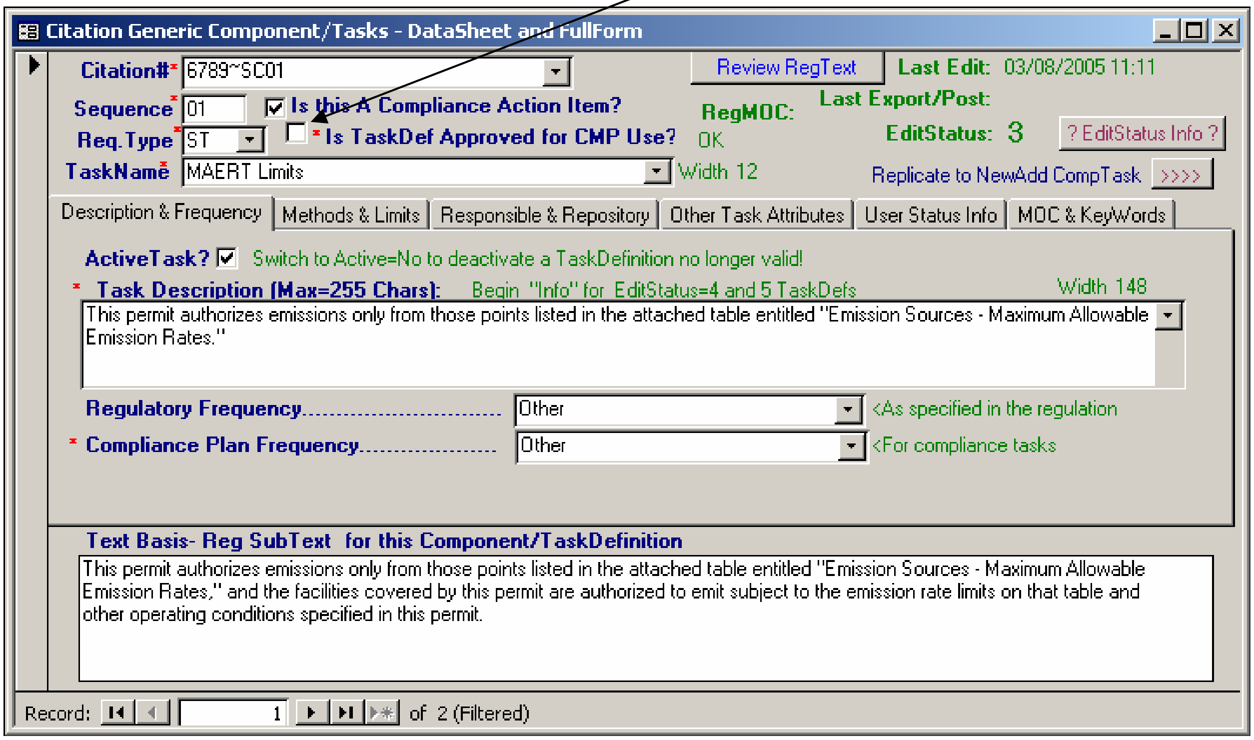


The tasks that were copied to the new permit number will have been set back to an Edit Status=3 (unapproved). You must visit each task component or go to the *TaskDefs-Ops* menu, *Advanced TaskDef Filter/Ops* to move the tasks to an Edit Status=6 (approved and ready for export).

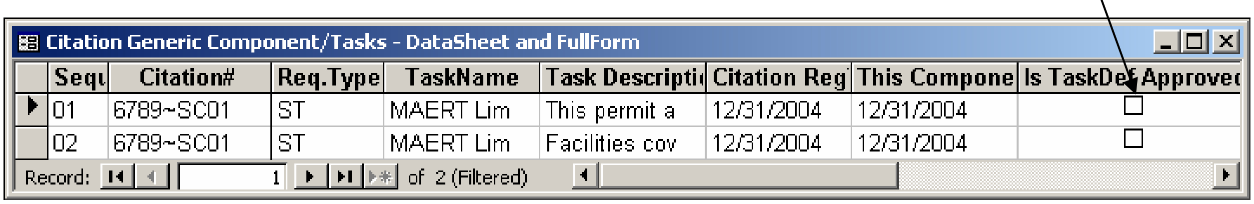
To approve task definitions that have an Edit Status=3, go to the *TaskDefs-Ops* menu, *Advanced TaskDef Filter/Ops*. On the *Comp/Task Conditions* tab, choose Edit Status =3, select *the Open in FullForm View* radio button, then run the **OPEN FORM Components/TaskDefs Data Entry Form**.



If necessary, review the task and attributes, then check the *Is TaskDef Approved for CMP Use?* This will change the Edit Status to 6.

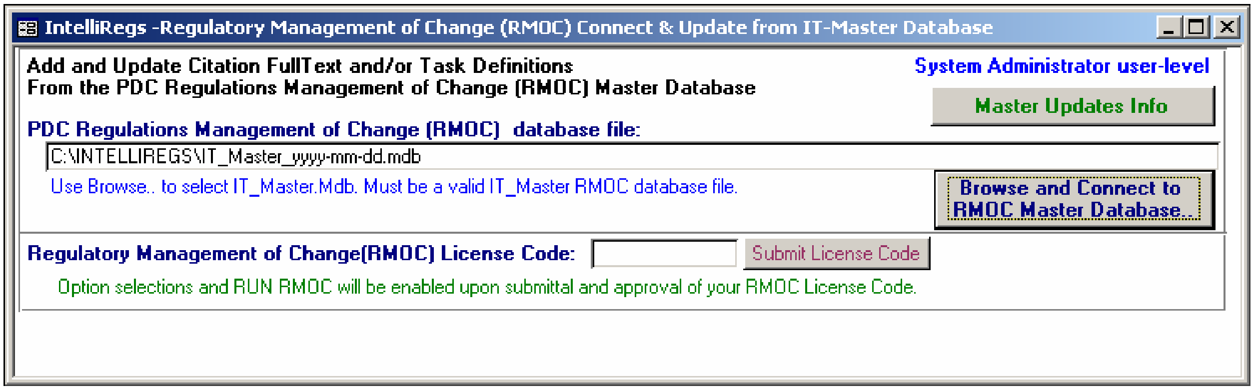


If you are copying a large number of permit conditions and tasks, you may more easily change the Edit Status to 6 by opening the form in datasheet view, then checking the *Is TaskDef Approved for CMP Use?* checkbox by scrolling down the list.

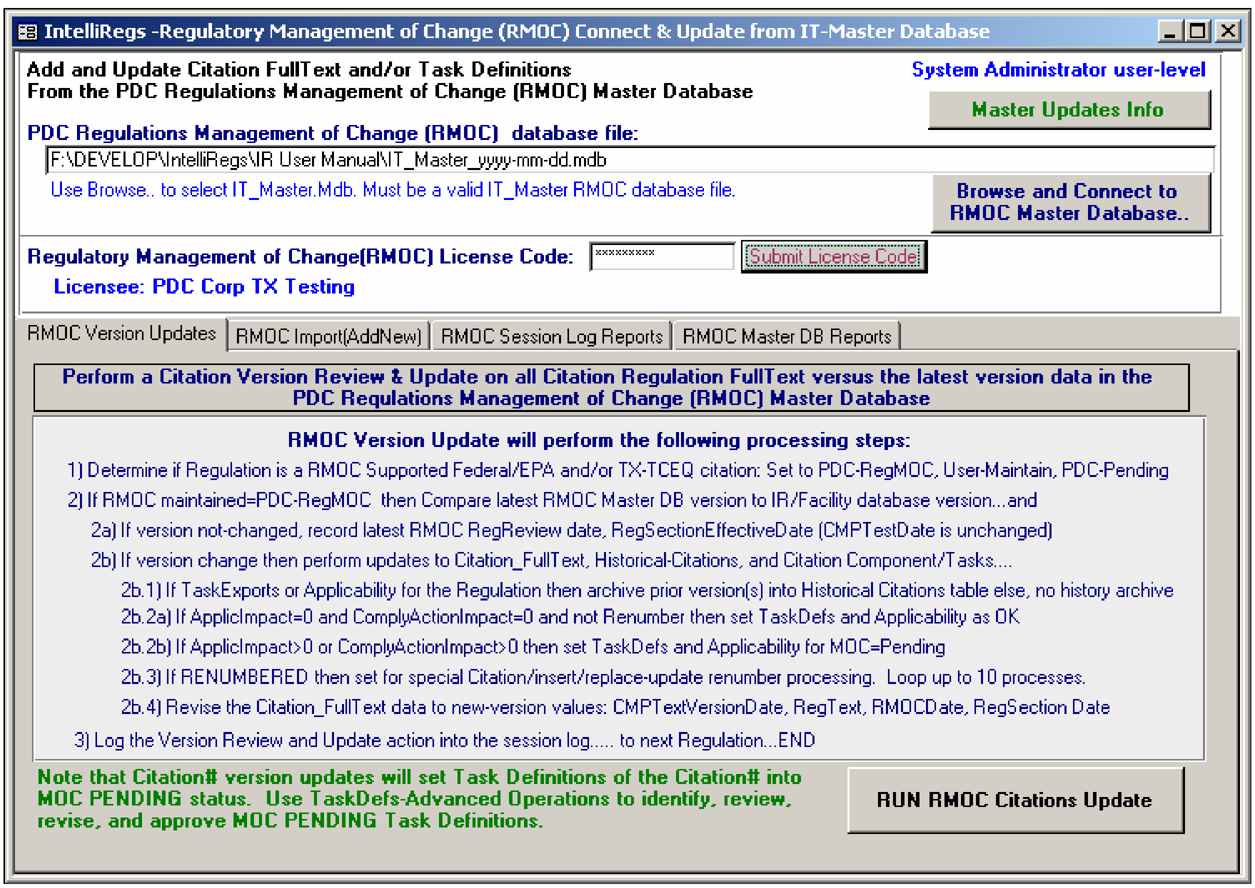


C6. Master RegText/Tasks Updates

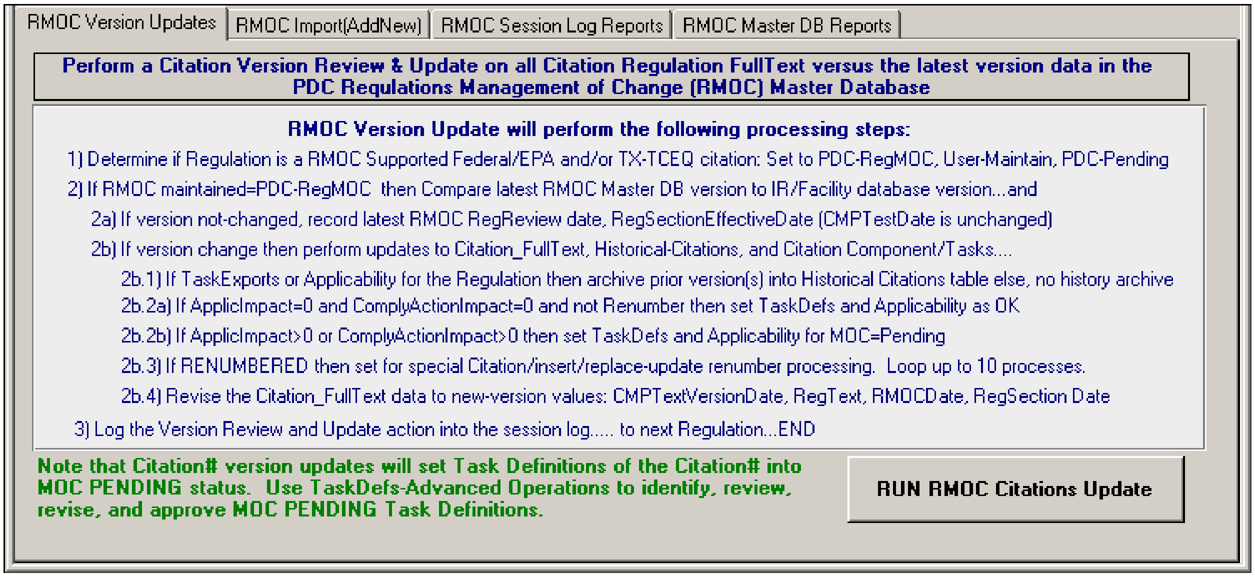
For subscribers to PDC's Regulatory Management of Change (RMOC) service, updates to Federal and State citation text is provided on a quarterly basis. After selecting the *RMOC & Master DB Adds or Updates* from the *TaskDefs-Ops* menu, you can proceed with RMOC operations. First, browse for and select the latest IT_Master_yyyy-mm-dd.mdb. The Regulatory Management of Change License Code box will then become active. Enter your company's License Code provided by PDC.



This will activate the RMOC screen.

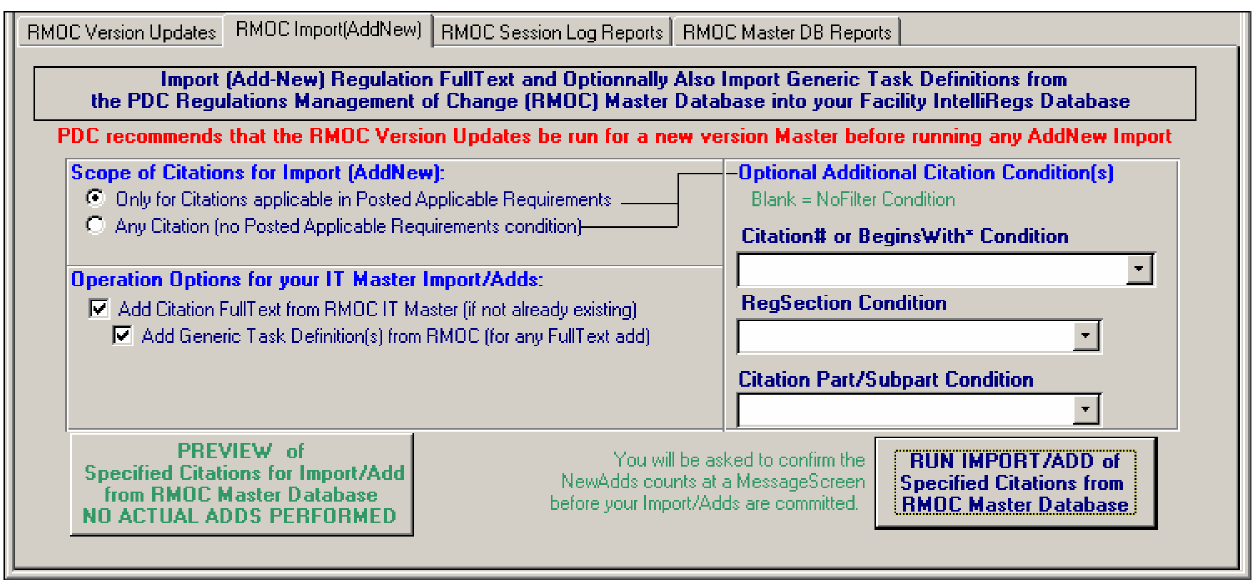


The *RMOC Version Updates* tab automatically performs the Regulatory Management of Change updates. This includes an analysis of your database, creation of historical records for citations that have changed, and an update of the Full Text and RegSection Effective date.

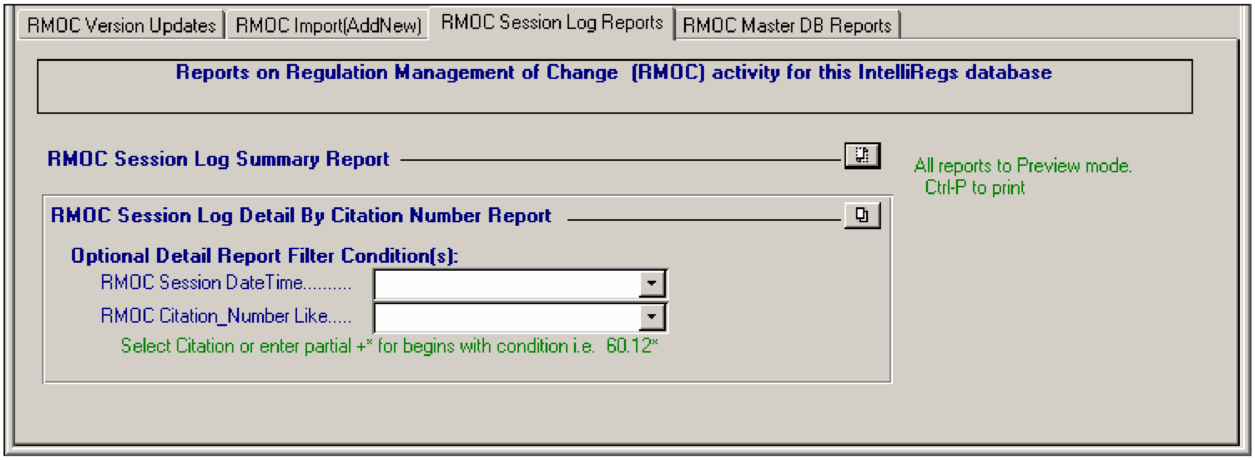


From the *RMOC Import(AddNew)* tab you may add citation Full Text (and optionally, Generic Task Definitions) from PDC's library. You may choose to add only citations for which you have already established applicability, or citations for which the applicability will be defined at a later date. These may be filtered for a single citation such as 60.110b(a), a citation and all it's subcitations using a wildcard such as 60.110b(a)*, a single Reg section such as 60.110b, or a citation Subpart such as 60Kb. Please be aware if you choose a Subpart, or even some Reg sections, this may add a very large number of citations to your database.

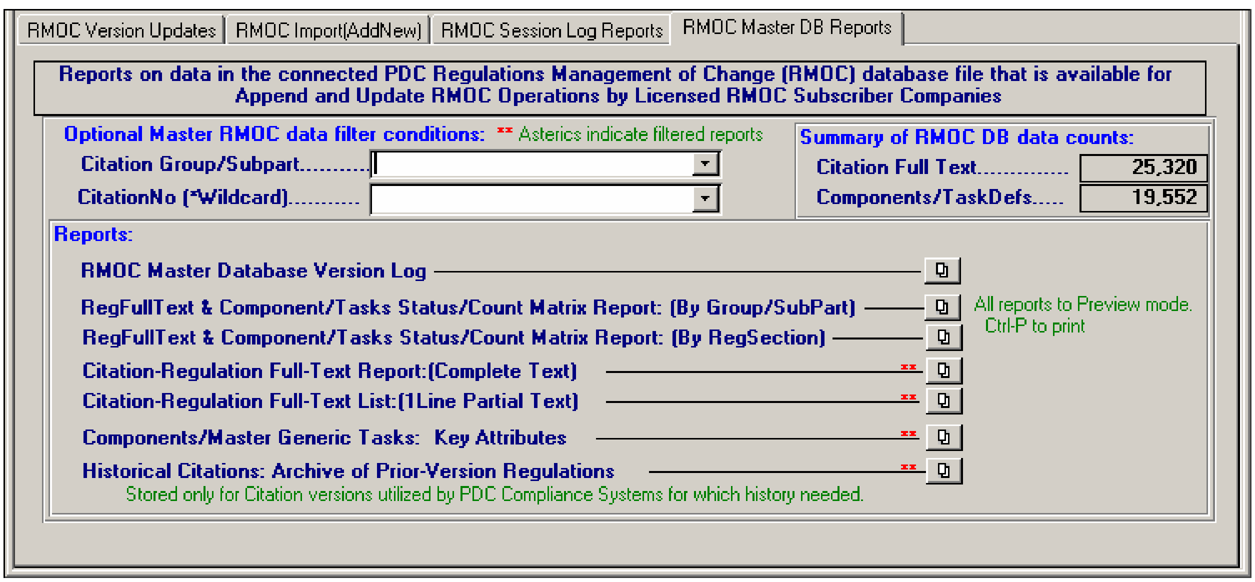
If Generic Task Definitions are added from the Master database, you can then tailor the descriptions and task attributes to your company specific needs.



The *RMOC Session Log Reports* tab allows users to review RMOC updates to their database and can alternately be filtered to show only by specific date/time or for specific citation numbers.



The *RMOC Master DB Reports* tab shows a count of the number of Full Text and Component/Task Definitions currently available from the IT_Master database.

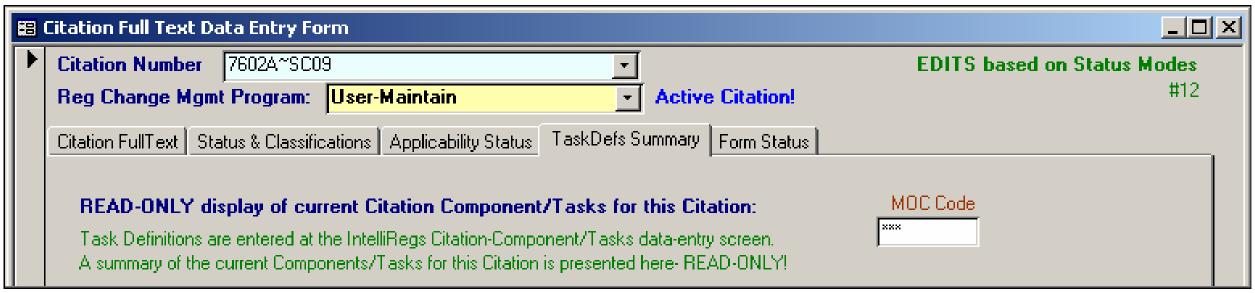


Reports of counts by Subpart or Reg section are also available, as well as Regulatory Full Text and Generic Task definitions.

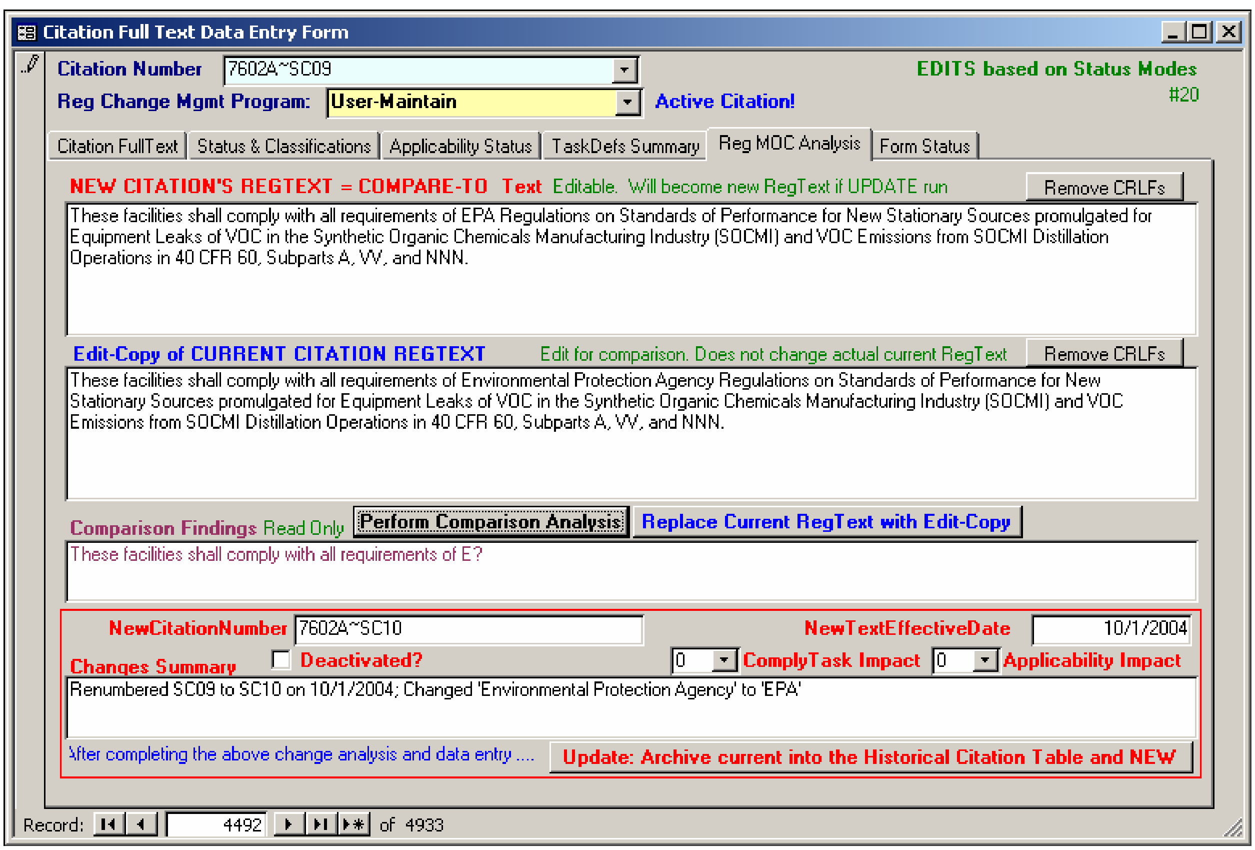
C7. Management of Change

Identifying and Processing Regulation Changes

Users that have User-Maintained citations, such as NSR permits, and that are provided the Regulatory Management of Change password can enter that password at the Citation Full Text edit screen in the MOC Code box. Note that this process is different from the Regulatory Management of Change (RMOC) service provided by PDC on a subscription basis.



The Reg MOC Analysis screen will become active and additional date entry cells will be made available and other cells (previously locked) will become available for editing.



On the *Reg MOC Analysis* tab users may paste or type the new text for a citation number into the top **NEW REGTEXT=COMPARE-TO** box. A copy of the current FullText for that citation number appears in the middle **CURRENT CITATION REGTEXT** box. By running the **Perform Comparison Analysis**, the program will compare the two texts and show a **?** at the first place the two texts differ in the **Comparison Findings** box. A summary of the changes should be entered into the **Changes Summary** box at the bottom of the screen.

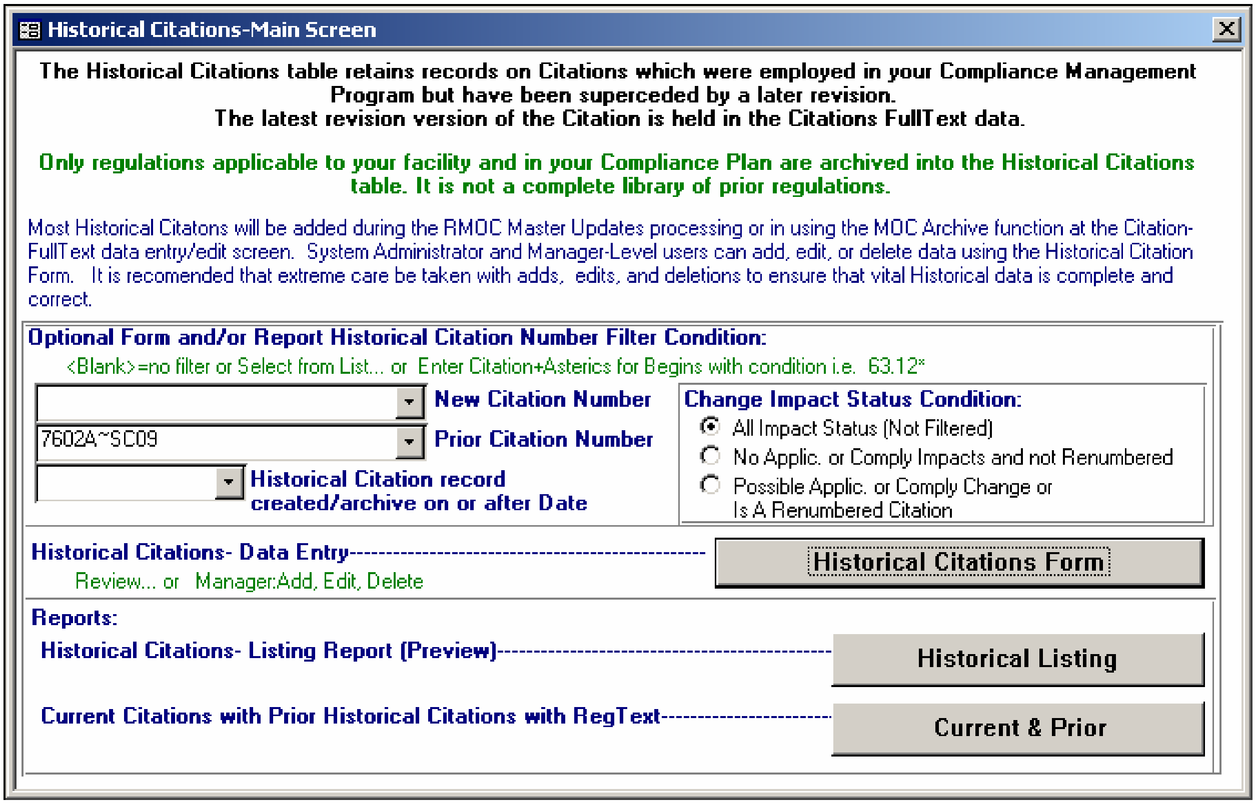
To archive the current text and replace it with the new text, enter the citation number, the new Text Effective Date, whether the changes have a potential impact on applicability or compliance tasks, and a changed summary. Then run the **Update NEW & Archive prior data to the Historical Citations Table**. This will create a record in the **Historical Citations** table and replace the current text with the new text and text effective date automatically. This allows for an audit trail of changes to NSR permits and other User-Maintained citations.

Renumbering of citations may also be done by the program automatically provided the new citation number does not already exist in the FullText. For a series of consecutive renumberings, begin with the highest number and work backwards. Follow the above procedures, except enter the **new** citation number at the bottom of the screen. Enter a Changes Summary that shows the renumbering. After running the Update function, the citation will be renumbered to the new number, as well as all associated Task Definitions.

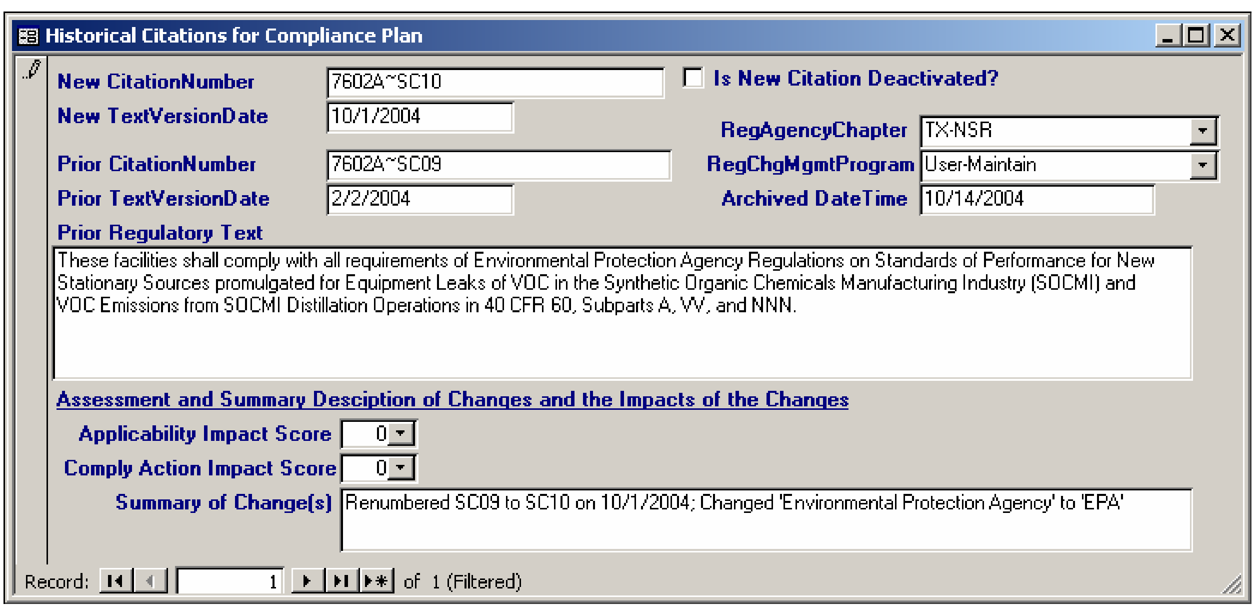
After updating Citation Full Text, the task definitions associated with the citations that had Reg text changes will need to be updated to reflect those changes.

C8. Historical Citations

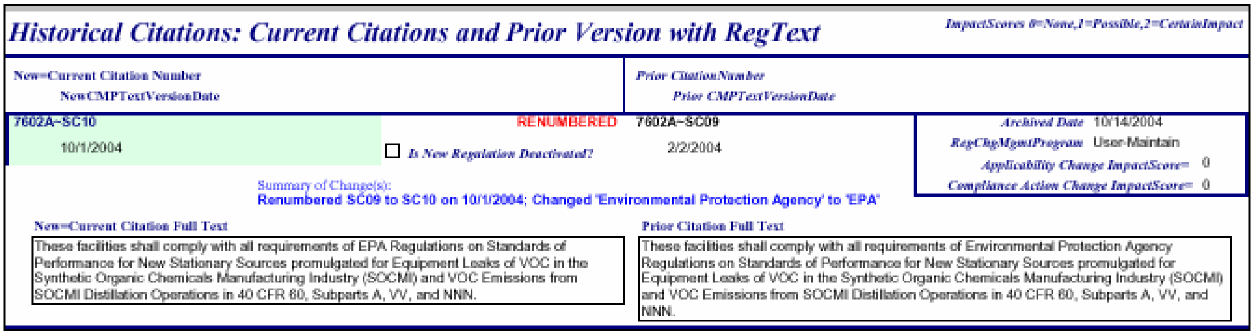
To view prior versions of citations, select the **TaskDefs-Ops**, **Historical Citations** menu item. To find historical records, enter the prior citation number if there has been a renumbering or the new/current citation number for citations that have had text changes but no renumbering.



Selection of the ***Historical Citations Form*** button will show all the records created by the MOC update process.



Selection of the ***Current & Prior*** button will provide a report which shows the Current Citation Full Text, the Prior Citation Full Text, the summary of changes, and whether the citation has been renumbered.



Historical Citations: Current Citations and Prior Version with RegText

ImpactScores 0=None,1=Possible,2=CertainImpact

New=Current Citation Number
NewCMPTextVersionDate

Prior CitationNumber
Prior CMPTextVersionDate

7602A–SC10 RENUMBERED
10/1/2004
☐ *Is New Regulation Deactivated?*

7602A–SC09
2/2/2004

Archived Date 10/14/2004
RegChgMgmtProgram User-Maintain
Applicability Change ImpactScore= 0
Compliance Action Change ImpactScore= 0

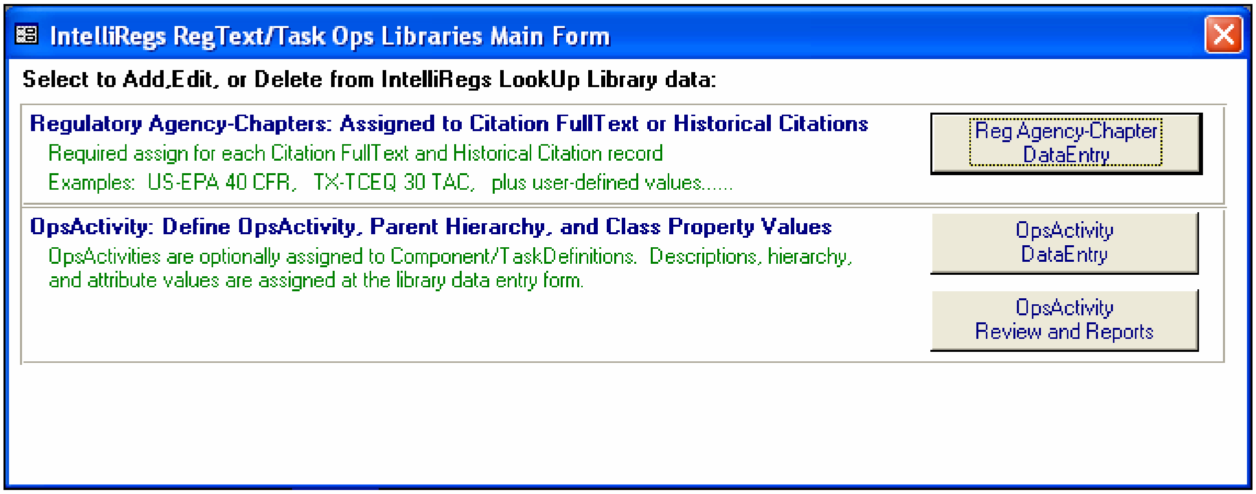
Summary of Change(s):
Renumbered SC09 to SC10 on 10/1/2004; Changed 'Environmental Protection Agency' to 'EPA'

New=Current Citation Full Text
These facilities shall comply with all requirements of EPA Regulations on Standards of Performance for New Stationary Sources promulgated for Equipment Leaks of VOC in the Synthetic Organic Chemicals Manufacturing Industry (SOCMI) and VOC Emissions from SOCMI Distillation Operations in 40 CFR 60, Subparts A, VV, and NNN.

Prior Citation Full Text
These facilities shall comply with all requirements of Environmental Protection Agency Regulations on Standards of Performance for New Stationary Sources promulgated for Equipment Leaks of VOC in the Synthetic Organic Chemicals Manufacturing Industry (SOCMI) and VOC Emissions from SOCMI Distillation Operations in 40 CFR 60, Subparts A, VV, and NNN.

C9. RegText/Tasks Libraries: Add, Edit

Regulation Text and Tasks Libraries contain values which are offered for selection at Citation, Applicability, and/or TaskDefinition data entry forms. The RegText/Tasks Libraries menu bar provides data entry forms to add, edit, or delete library data or to report and review the data.



Reg Agency-Chapter:

Reg Agency Chapters identify the Regulatory Agency/Chapter for Citation numbers used in the IntelliRegs system. By specifying the RegAgency-Chapter similar numbers used by different regulations may be used preventing unknown or ambiguous references of Citation numbers.

Special US-EPA 40 CFR and TX-TCEQ 30-TAC RegAgency-Chapters.

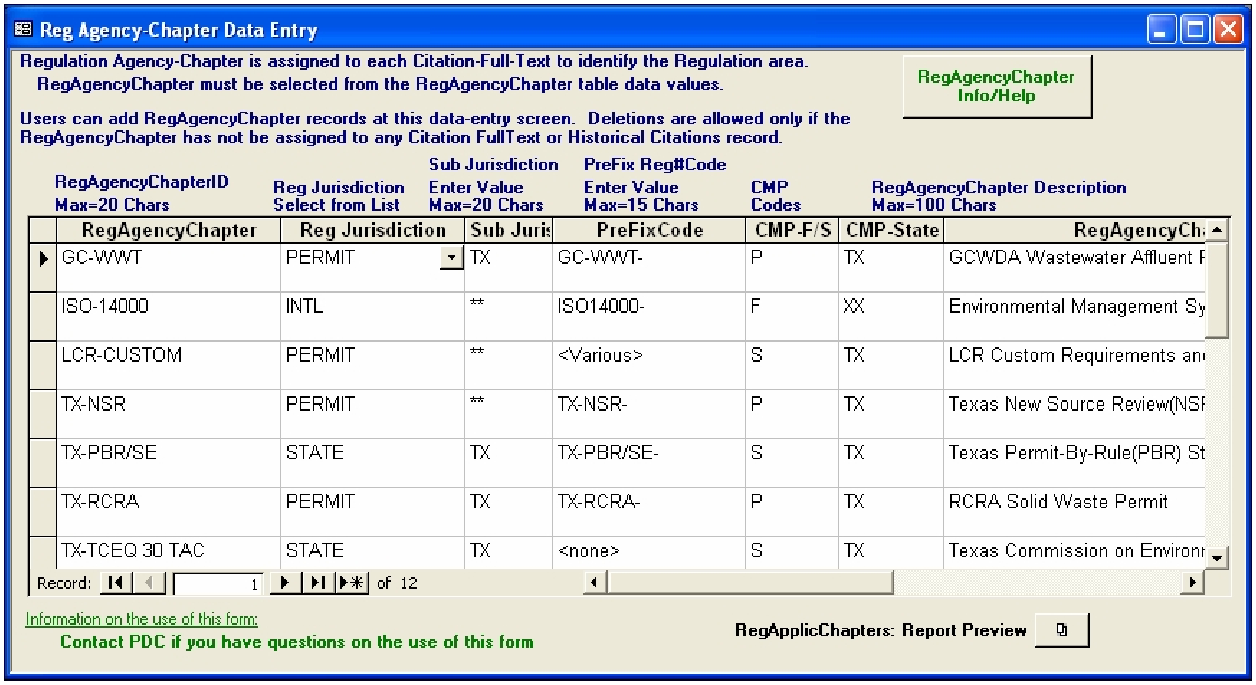
Two RegAgency Chapter numbers are already established for the IntelliRegs database and are not able to be edited or deleted. These are the US-EPA 40 CFR and TX-TCEQ 30-TAC RegAgency-Chapters.

Note that Citation numbers such as "60.112(b)" that are members of the US-EPA 40 CFR RegAgency-Chapter do not require a prefix such as "40CFR-" in IntelliRegs. Note also that Texas regulations such as "115.23(a)" that are members of the TX-TCEQ 30-TAC RegAgency-Chapter also do not require a prefix such as "30TAC-". Members of these two, special RegAgency-Chapters are the only Citation numbers that are not prefixed by a RegAgency-Chapter code.

Other RegAgency Chapters:

Other RegAgency-Chapters are created as required for the Citations that you need to enter into your IntelliRegs system. Add the RegAgency-Chapter at the RegAgency-Chapter data entry screen and then the new value will be available for selection at the Citation_FullText data entry screen for Citations that are to be members of that RegAgency-Chapter. Be sure to create a short, definitive prefix that you will use as the beginning characters for all citations that are members of your new RegAgency-Chapter. Some example RegAgency-Chapters are in the base IntelliRegs

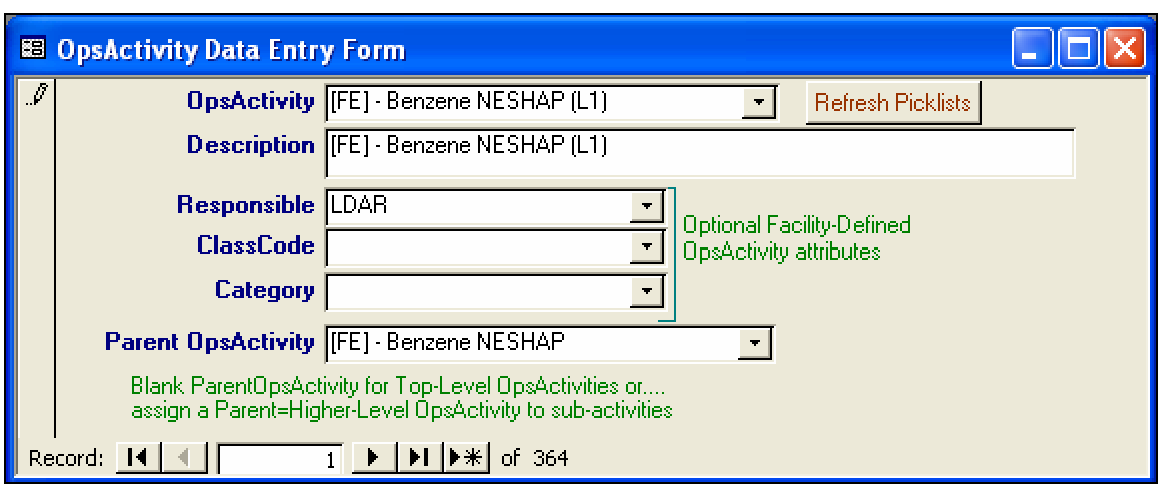
system. Create your new RegAgency-Chapters similar to those examples. You may delete example RegAgency-Chapters that you will not be using if you wish to do so.



OpsActivity:

OpActivity may optionally be assigned to IntelliRegs Task Definitions. (OpsActivity is not a required Task Definition field and can be left blank). OpsActivity and the parent-child relationship of Task Definitions may be employed in your Compliance Management system as one method of organizing the many Compliance tasks into groups and subgroups.

OpsActivity will be assigned at the Task Definitions data entry screen. (See UserManual Section 4: Paragraphs B4 and B5) The values selected must be in the library OpsActivity table. Valid OpsActivity identifiers, description, and parent information are entered at the OpsActivity data entry form.



Naming of your OpsActivities should represent the outline of OpsActivities (Parent, child, child...) similar to your Windows Explorer files "tree" structure. OpsActivities are like the folders/directories and the TaskDefinitions will be like the files within those directories if the OpsActivity assignment options are employed.

Note that unlike the analogous Windows Explorer files tree example each of your OpsActivities must be uniquely named so you will probably have the structure apparent within the 30 character OpsActivity name. For example the simple tree of OpsActivity heirarchy below shows several OpsActivities and their parent OpsActivity relationships.

- Mgmt
  - Mgmt-Month
  - Mgmt-Week
  - Mgmt-Day
- Ops
  - Ops-Qtr
  - Ops-Week
  - Ops-Day
- Env
  - Env-Month
  - Env-Week
- DCS
  - DCS-WkData
  - DCS-DayData
  - DCS-HrData

Contact PDC for additional information, suggestions, or to share ideas on creating an OpsActivity outline or establishing names and hierarchy for OpsActivities in your compliance management system.

IntelliRegs User's Manual

Section 7

Task Definition Development
Report Examples & Attachments

7.1 IntelliRegs Task Definitions Reports
Single page examples of reports available in IntelliRegs.

7.2 Procedures and Advanced Instructions Documents
Standard Procedures and Guidance documents for task definition processing.

7.3 Task Definitions Process Flow Charts
Diagrams of the Task Definitions Process.

IntelliRegs User's Manual

Section 7.1

IntelliRegs Task Definitions Reports

Single page examples of reports available in IntelliRegs. Users are invited to print each report from their facility's database to assemble 1-page report examples for their data.

IntelliRegs User's Manual

Section 7.2

Procedures and Advanced Instructions Documents

Documents in this User's Manual section provide additional information regarding procedures and advanced instructions for the IntelliRegs Program. This section will be revised to add or revise its contents. Licensed IntelliRegs users will be sent updates of this section when revised.

PDC Corp Suggested Guidelines for IntelliRegs Compliance Task Data Entry

A. Task Definition Guidelines

1. Skip one-time tasks that have already been performed, and will not be done again.

2. Make tasks for all routine efforts (e.g., weekly, monthly, annual, etc.)

3. Make tasks for those one-time efforts that could be repeated in the future under certain conditions, but set the "Keep History" flag to "NO" in such circumstances. The *Frequency* Attribute should be set to "When Required by Conditions," and the *Conditions* Attribute should be filled in to specify the conditions under which the task is performed.

4. Make more than one task for a regulatory requirement that can only be met by the performance of multiple efforts if there is a possibility that:
   (a) each effort could/will be performed by different people
   (b) each effort could be done/not done independently
   (c) a deviation could occur in one of the multiple efforts that would need to be identified separately in a TCEQ Semi-Annual Deviation Report
   (d) "history" data confirming completion of the efforts could/will be stored in separate compliance data repositories

   Otherwise, make one task for all efforts required. See also "Task Groups," below.

5. Do not repeat Attribute data in more than one Attribute category; e.g., do not enter "Quarterly Report" under the *Task Description* or *Method* Attribute– enter "Quarterly" under Frequency only. Otherwise, there will be maintenance requirements to prevent data reconciliation problems.

B. Sentence Construction Guidelines for Task Attributes

1. To achieve a 1:1 match between "text components" and compliance tasks, you can modify the text of a source document by adding "@" signs and changing periods to semi-colons, where necessary, to force making or removing component. <u>Note</u>: all editing of source document text must be completed before final "smart parse" is run and tasks are defined.

   REASON: *Some users find that close text component-to-task correspondence makes the translation of regulation text, by paragraph, to compliance tasks more intuitive.*

2. Standardize key phrases wherever possible, such as:

- "in accordance with"	- "control device"
- "except for"	- "Group I Source" (or II, or III)
- "at all times"	- "subject to"

   REASON: *Ease of understanding task assignments, and possible future use of a search routine to find instances where specific phrases appear in task lists.*

3. Begin the data entry of each Attribute with an action verb where possible, such as:

- "Submit"	- "Monitor"
- "Report"	- "Repair"
- "Maintain"	- "Notify"

REASON: *Items will be more easily found on drop-down lists.*

4. Follow standard word usage patterns, such as "VERB - NOUN - ADVERB or ADJECTIVE," e.g.: "Repair Valves that are determined to be leaking."

REASON: *Ease of understanding task assignments.*

5. Standardize the use of "List Phrases," e.g.: "valves, pump seals, and flanges."

REASON: *Ease of understanding task assignments.*

6. Standardize references to external guidelines, SOPs, and standard methods, such as:

- "Method 9"	- "AP-42"
- "SOPs"	- "Regulation 7"

REASON: *Ease of understanding task assignments, and possible future use of a search routine to find instances where specific phrases appear in task lists.*

7. Standardize references to "When Required Conditions," such as:

- "Start-up"	- "Accidental Release"

REASON: *Ease of understanding task assignments, and possible future use of a search routine to find instances where specific phrases appear in task lists.*

8. Standardize references to "Compliance Data Repository," such as:

- "Maintenance Logs"	- "DCS"
- "Operator Logs"	- "Start-up Checklist"

REASON: *Ease of understanding task assignments, and possible future use of a search routine to find instances where specific phrases appear in task lists.*

C. Guidelines for Creating Compliance Task Groups

1. Create one or more Task Groups for tasks with no definitive schedule, such as:
   - Tasks that are advisory or informative in nature (e.g., "be advised that…")
   - Tasks that are "Continuous" or "When Required" (see Item #2, below)
   - Tasks that are done on a "one-time basis" (e.g., "ensure emission are controlled")

2. Consider creating a Primary Task with a periodic frequency (e.g., Monthly) for Groups that consist of "Continuous" and "When Required" tasks. The purpose of the periodic frequency task will be to validate that the grouped tasks were done as required.

“Applicable Citation Number” and the Detailed Citation FullText Paragraphs and Component/Tasks Associated

By Richard Wiand, PDC

Review of an important/critical Regulatory Wizard and IntelliTask Issue.

It is important to understand that the designation of a “citation number” as applicable to an equipment item may indicate one or more detail citation paragraphs/section applicability.

For Example:

“Applicable Citation Number”= 60.132(a)

Citations Applicable = 60.132(a), 60.132(a)(1), 60.132(a)(2), & 60.132(a)(3)

An “Applicable Citation Number” might be determined using the Regulatory Wizard’s rule-based RRT processing based upon entered OP-UA form values, or might be entered as a “Special Reg”=facility-determined, Engineer-Determined applicable citation.

The situation of a single “applicable citation number” actually meaning applicability of multiple detail citation paragraphs is handled by PDC’s programs utilizing a “citation begins-with” processing. Referencing the example above, PDC’s programs would process data for “citation begins-with”=60.132(a), which would retrieve all of the detail citations.

The impact of this processing on determining IntelliTask tasks associated with equipment based upon Regulatory Wizard “Applicable Citation Numbers” is to associate all of the tasks for all detailed paragraphs. In the example, any tasks for citations 60.132(a), 60.132(a)(1), 60.132(a)(2), and 60.132(a)(3) would be associated with equipment with 60.132(a) as the “applicable citation number”.

The “citation begins-with” processing is also used in IntelliTask’s SmartParse Settings operation if the Set to YES if found in RegWizard… processing is run. In this case, every citation in the selected RegWizard data would cause IntelliTask Citation Text to be marked to YES for all “citation begins-with” the Regulatory Wizard citation number.

What if not all of the detail citations are applicable?

In the example above, if 60.132(a)(2) is not applicable, then designation of the “applicable citation number” as 60.132(a) would be an error! The correct applicable designation would need to itemize three applicable citations 60.132(a), 60.132(a)(1), and 60.132(a)(3). Therefore, indicating a “base” citation to designate multiple paragraph applicability is correct only for “and” data, never for “or” data.

IntelliRegs User's Manual

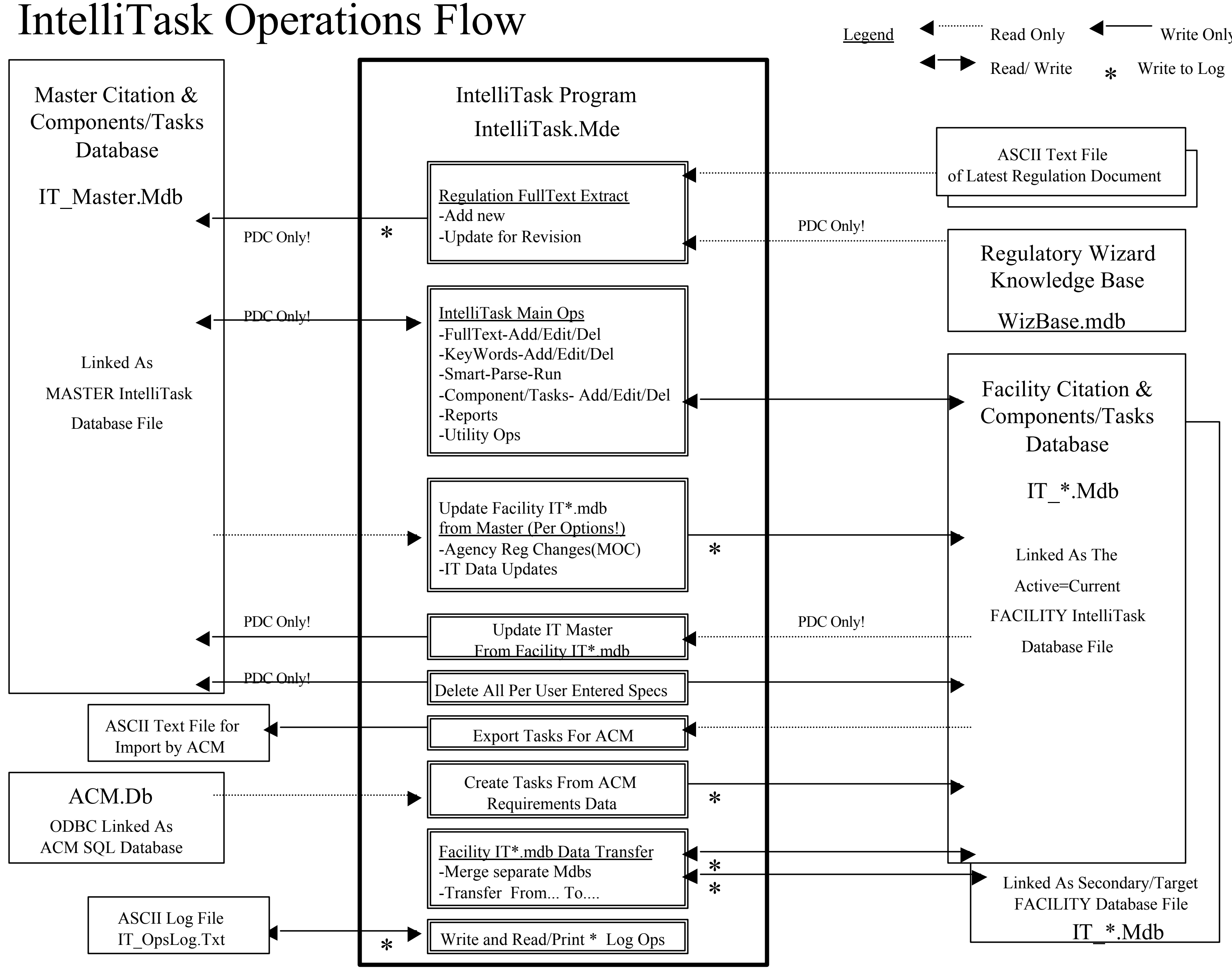
Section 7.3

Task Definitions: Attachments Flow Diagrams

Documents in this User's Manual section provide additional information regarding the flow of Task Document processing or program operation flow. This section may be revised to add or revise its contents. Licensed IntelliRegs users will be sent updates of this section when revised.

Section RefID	**Document Title, Summary Contents, Filename/Type and Author**		**Document Date**
5.3-1	*IntelliRegs Operations Flow-Detailed View* Operations and Data Import/Export Flow including Update from Master, Management of Change, RuleParse, Import/Export for IT Datafiles and TaskTrakker Export By Richard Wiand (IT_Flow1.Ppt)	(1 Pg)	Oct 1999
5.3-2	*IntelliRegs Data Flows* IntelliRegs, TaskTrakker data flow diagrams By Jerry O'Brien	(3 Pgs)	Oct 1999
5.3-3	*IntelliRegs Task Development Process* From agency citation text to TaskTrakker-ready task: Summary process flow By Richard Wiand	(1 Pg)	July 2000

IntelliTask Operations Flow



10/29/99 PDC IT_Flow1.ppt

IntelliRegs™

an Expert System for formulating
regulatory compliance tasks and determining federal and state rules
that are applicable to plant processes and equipment

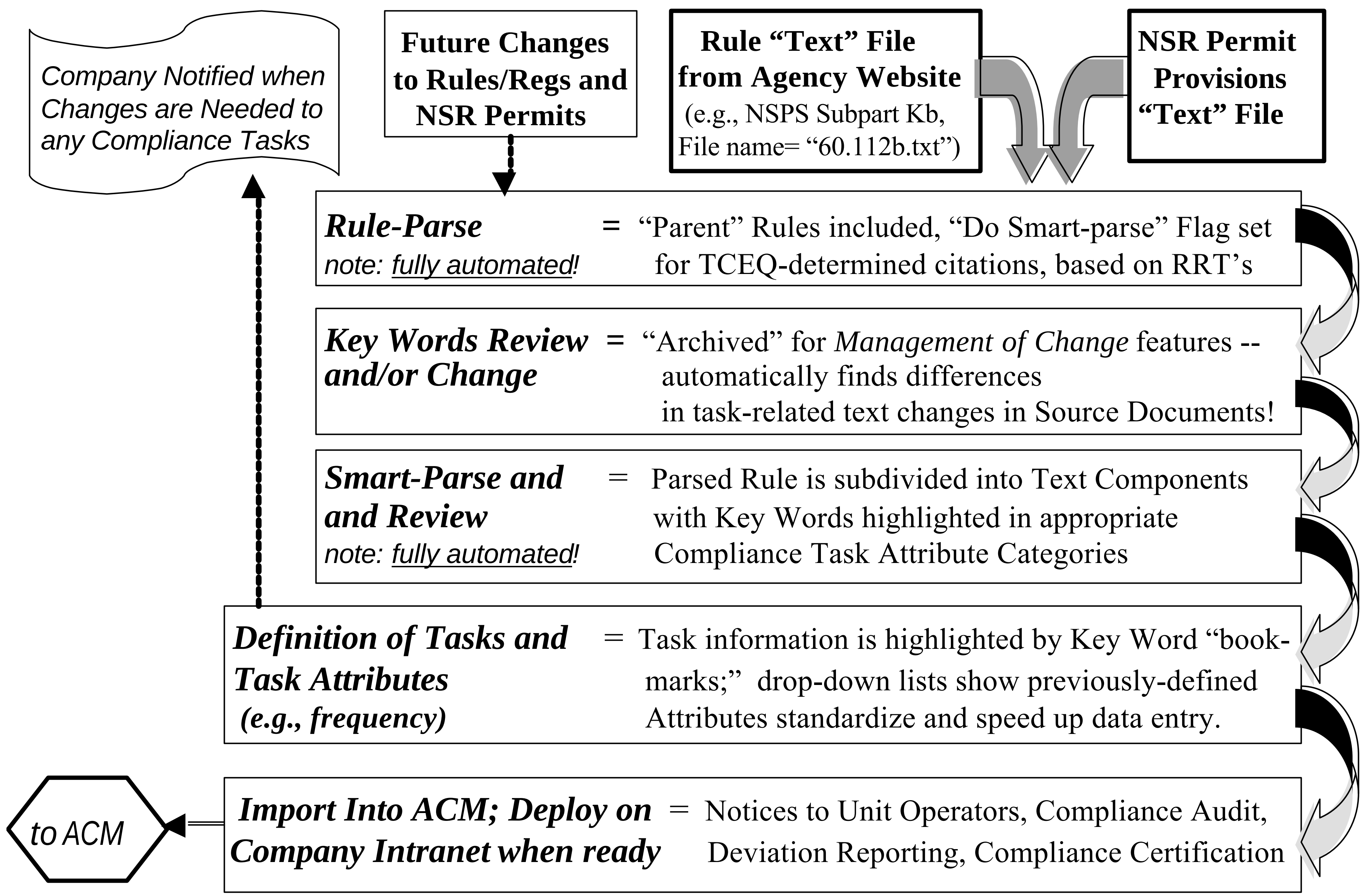
Data Flows and
Management of Change Service Center

Developed by

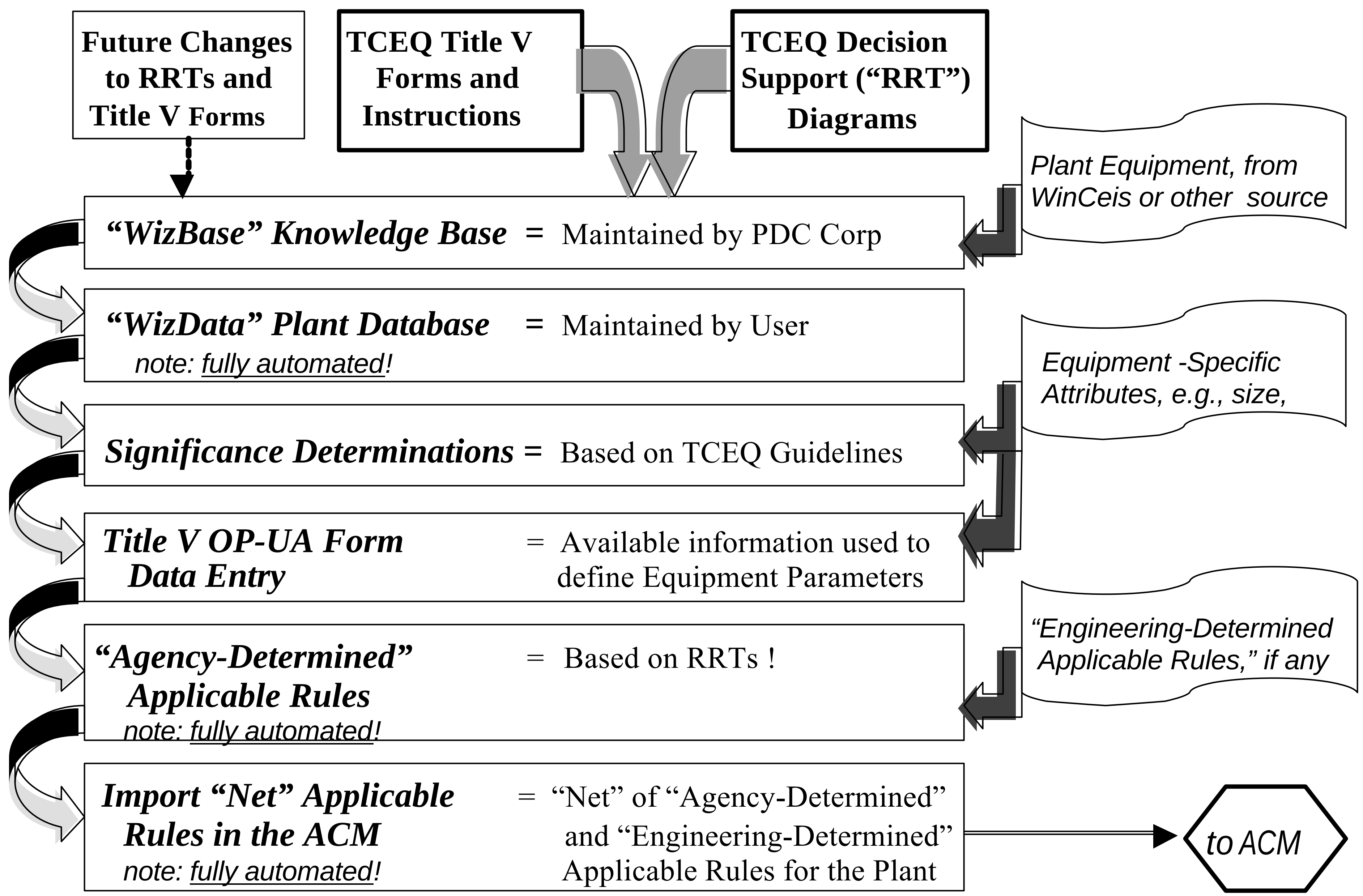
Process Data Control Corp

903-D Medical Center Drive
Arlington, Texas 76012
phone: 817-459-4488
website: www.PDCCORP.com

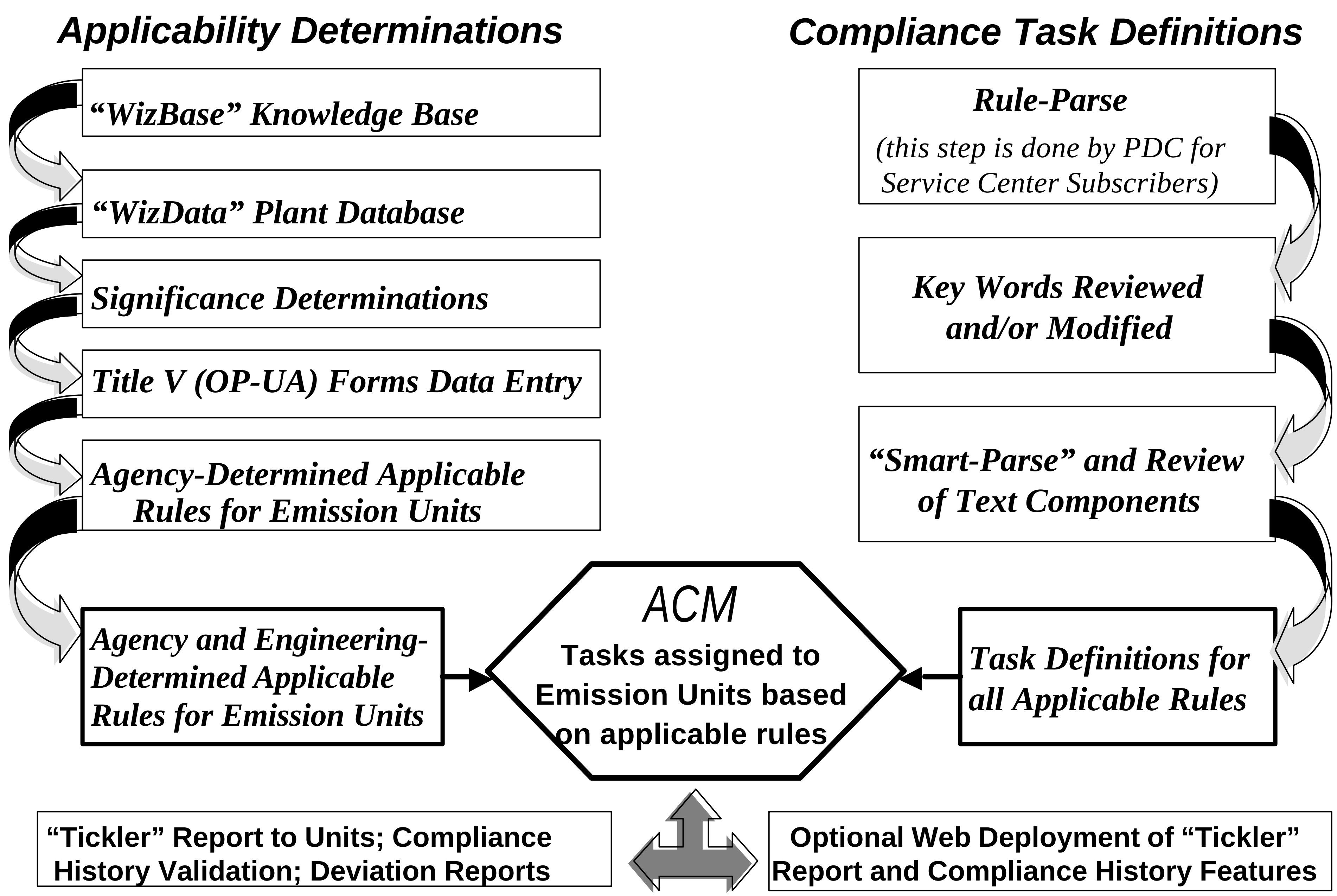
IntelliRegs Compliance Task Definition Data Flows



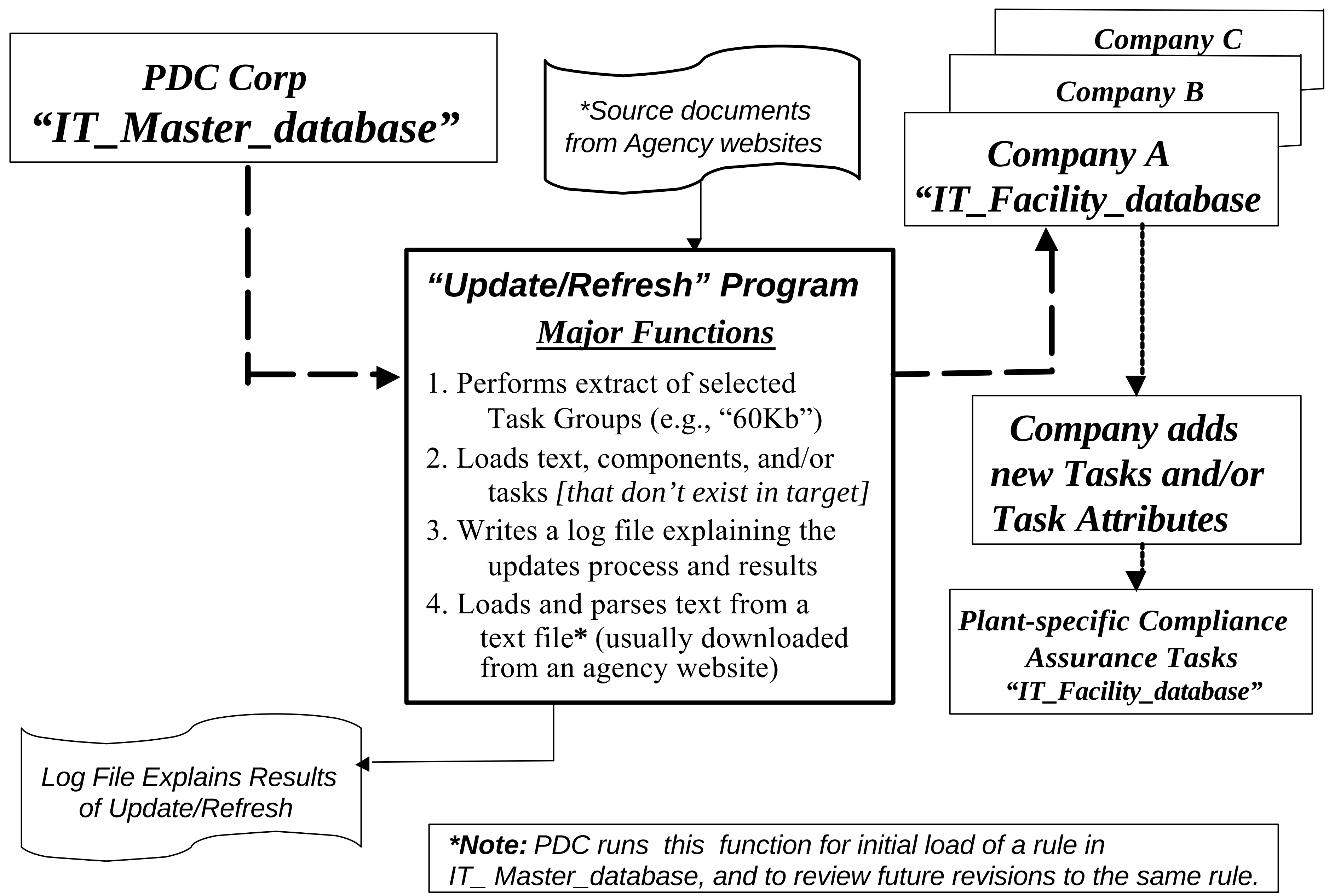
IntelliRegs Applicability Determinations Data Flows



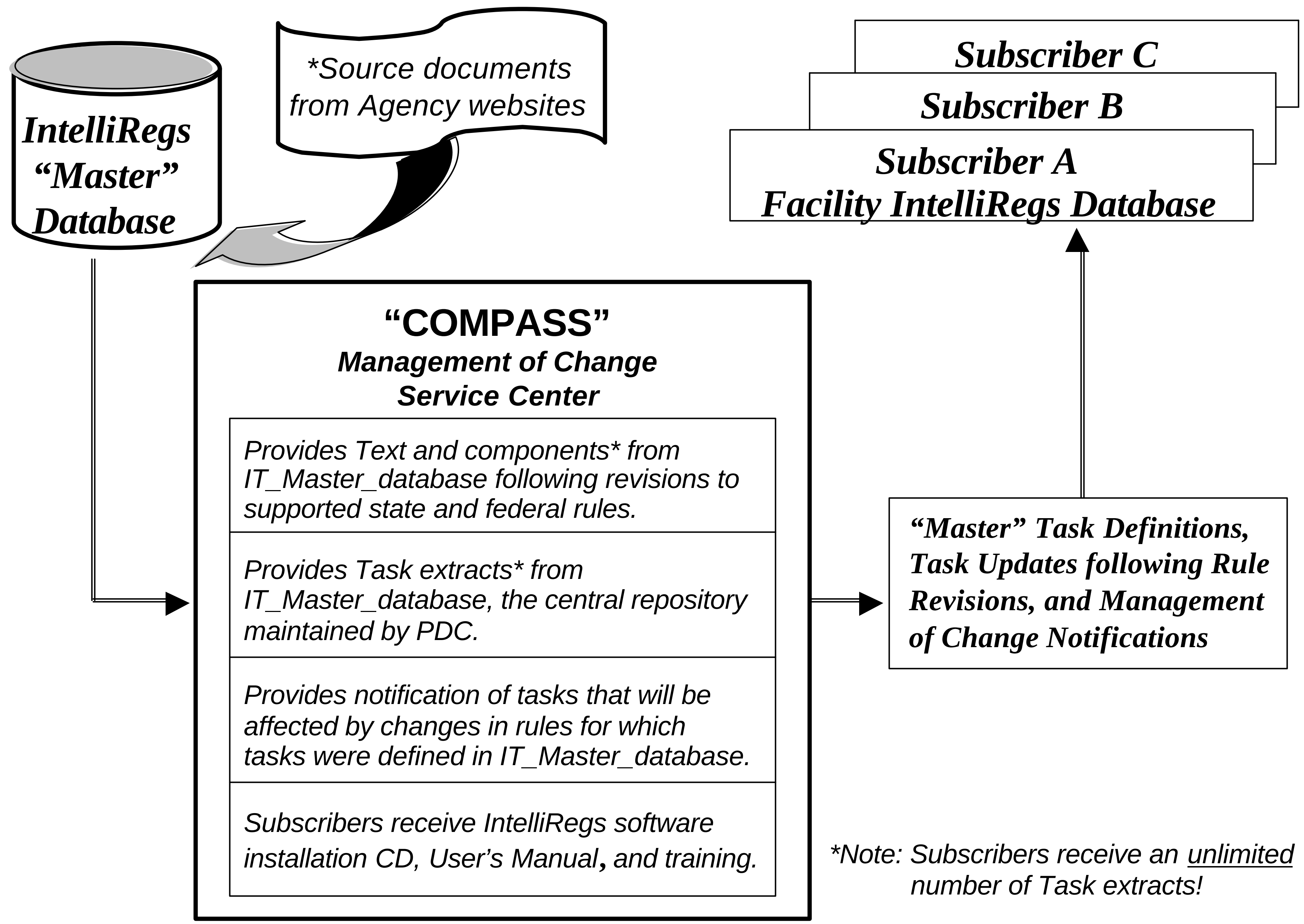
IntelliRegs Data Flows Into the Air Compliance Modules



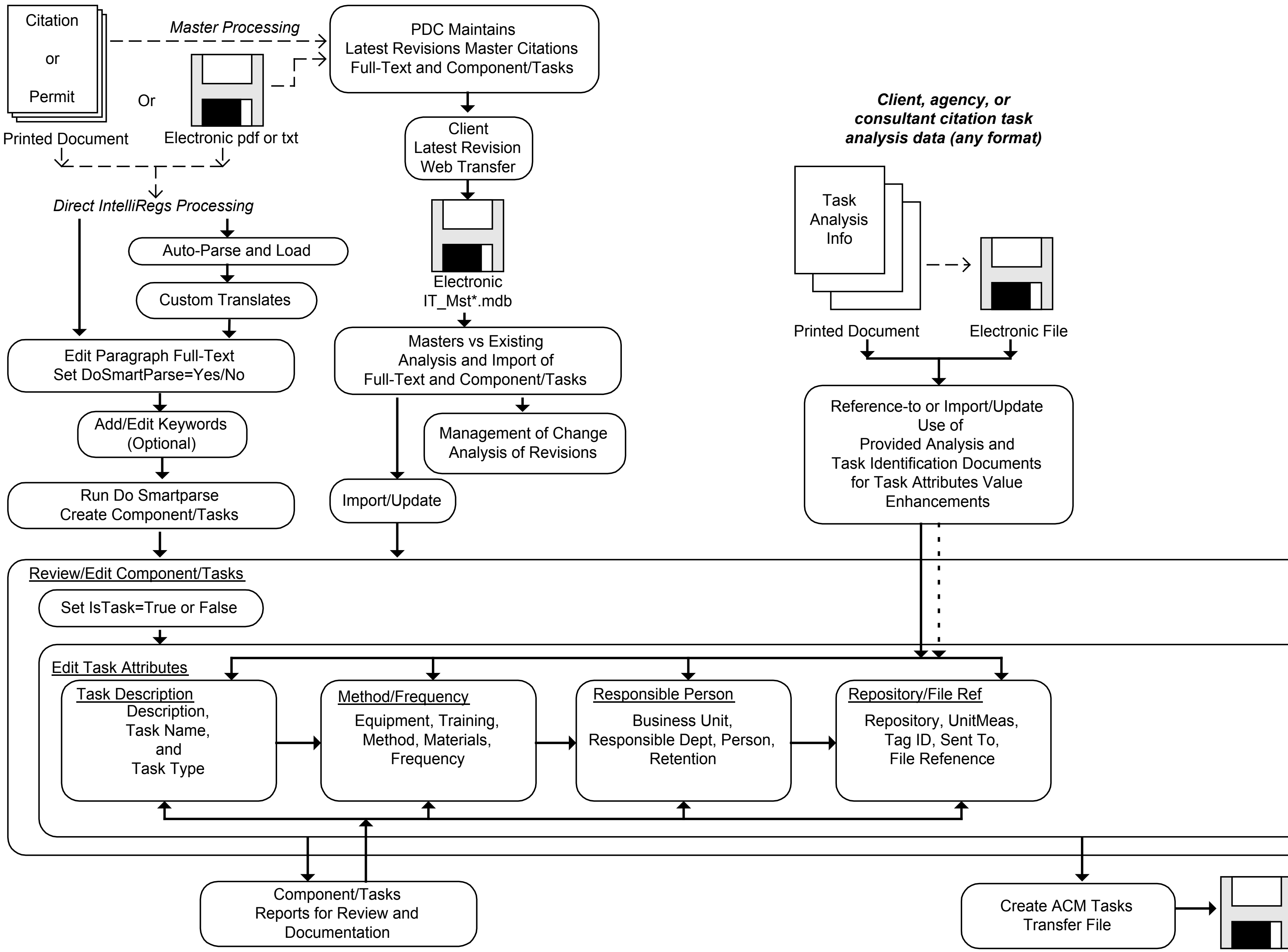
IntelliRegs 'Update/Refresh" Program Functions



Overview of Management of Change Service Center



IntelliRegs Task Development Process



Program Administration

Provides information on the Admin-Ops menu options on the IntelliRegs main menu bar.

IntelliRegs User's Manual

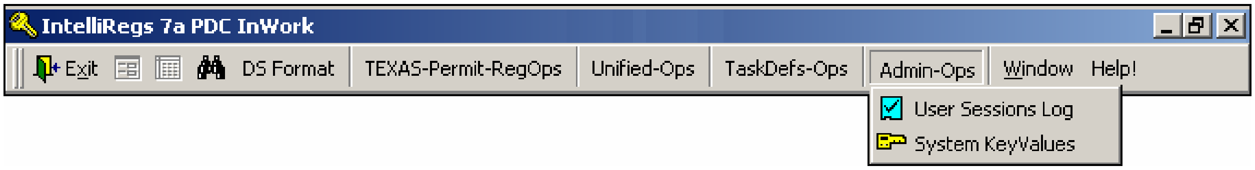
Section 8

Admin Ops: User Session Log & System Key Values

Paragraph and Title **Page**

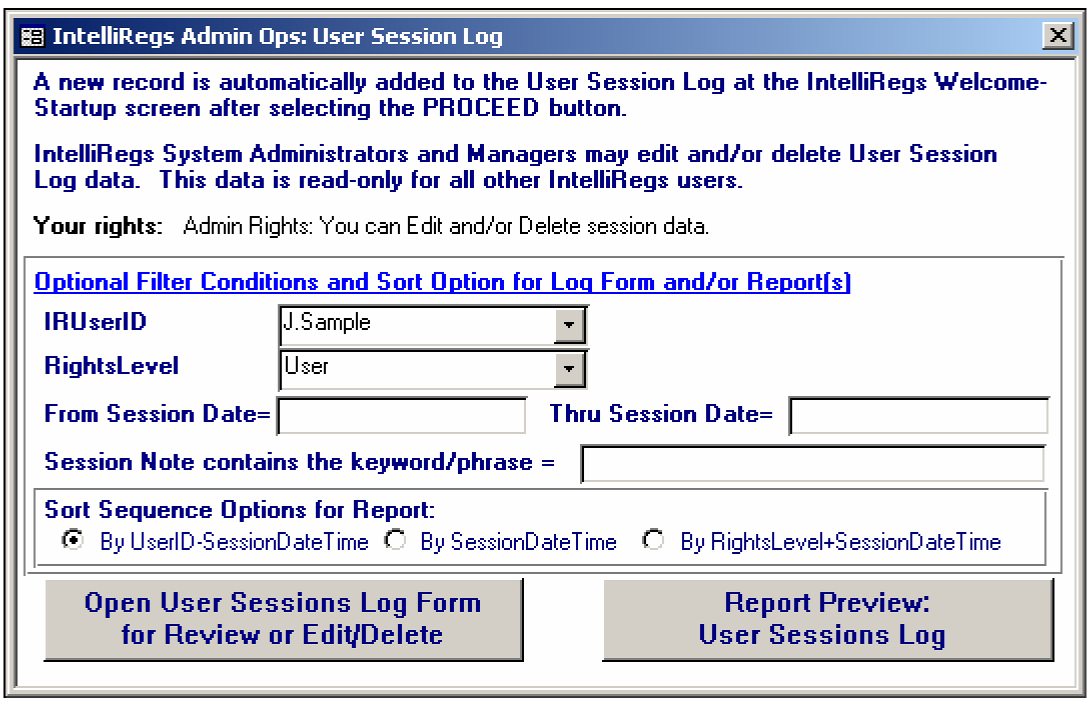
Admin Ops: User Session Log & System Key Values

The Admin Ops are available from the **Admin-Ops** menu selection.

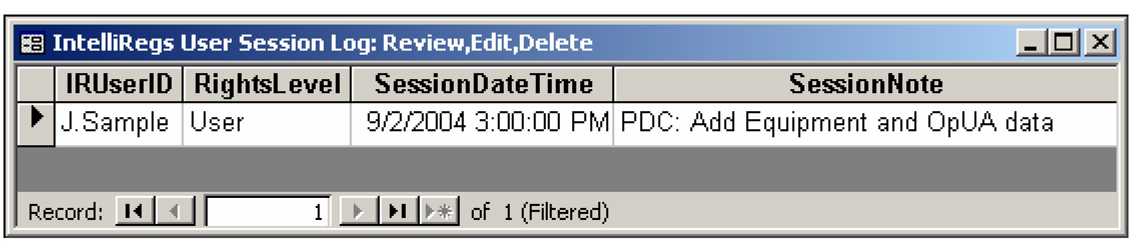


A. Admin Ops: User Sessions Log

Following selection of the **<u>User Sessions Log</u>** item from the Admin-Ops dropdown options the IntelliRegs Admin Ops: User Session Log main screen will be presented. Operations run from this screen allow you to see the User Session Log information contained in several different formats. You may filter the information for a single UserID, a particular RightsLevel, by a date range, or records containing a keyword or phrase. This information may also be sorted by UserID session date and time, by session date and time for all users, or by rights level plus session date and time.

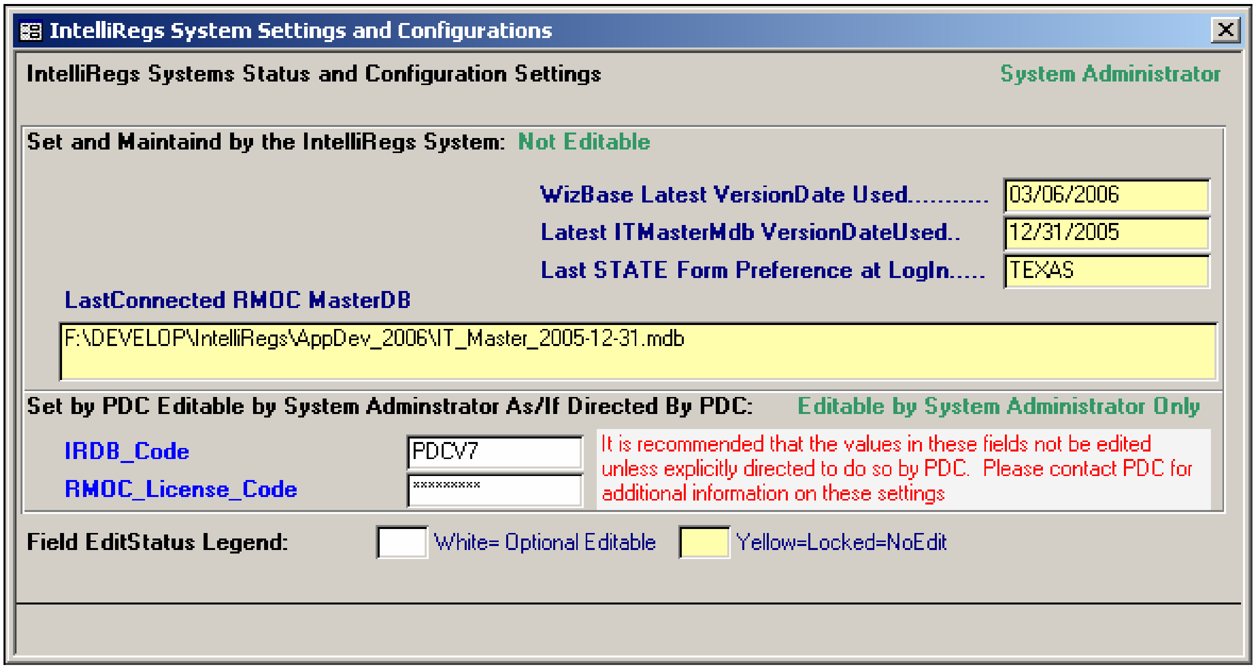


Once the log is opened as shown below, only Administrators or Managers may make edits or deletions.



B. Admin Ops: System Key Values

Following selection of the System Key Values item from the Admin-Ops dropdown options the IntelliRegs System Settings and Configurations screen will be presented.



System Settings and Configuration values can only be edited by a user with IntelliRegs Administrator rights. The values should only be revised when advised to do so by PDC.

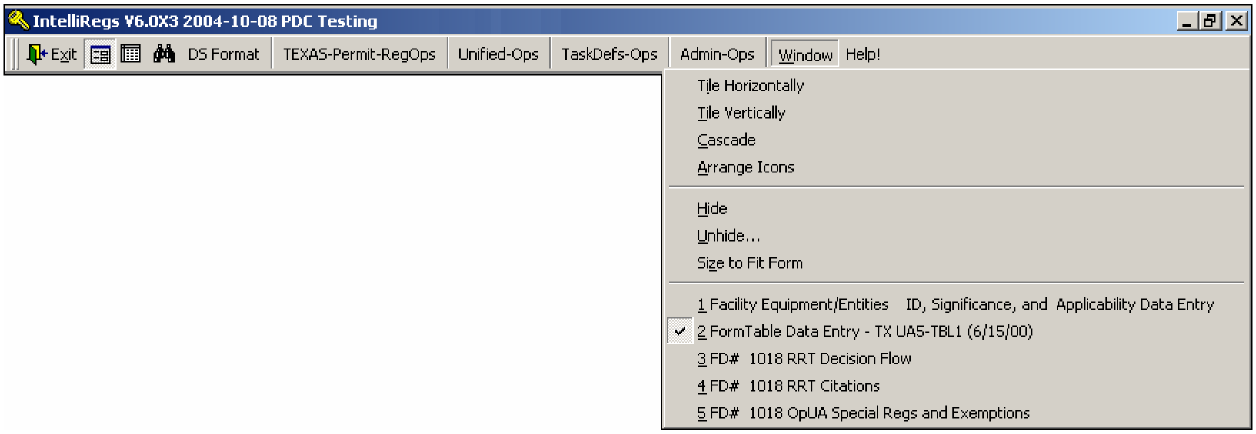
IntelliRegs User's Manual Section 9:

Tips, White Papers, Procedures, Additional Documents

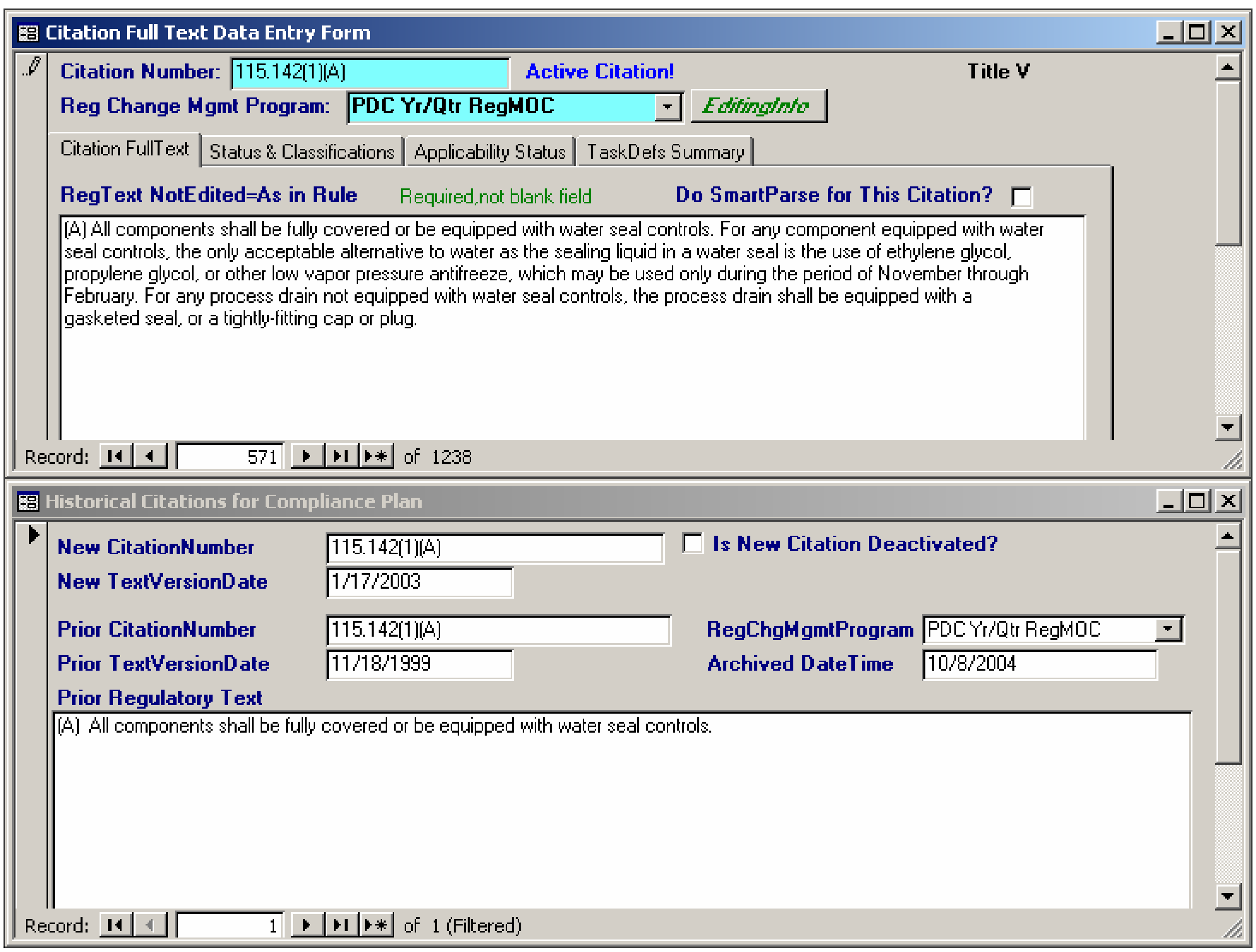
This section contains additional tips, papers, procedures, and documents of interest to IntelliRegs users.

A. Tips

On the ***Windows*** menu users have the capability to move between windows or tile or cascade multiple open windows.



For example, in the *Full Text Data Entry Form* users can also open the *Historical Citations* form to review how a regulation has changed by tiling them horizontally.



This feature is especially useful on the OpUA forms where multiple windows are employed. If you open several windows and cascade them, you only have to click on a window to bring it to the front.

If you are clicking on several windows in succession and lose one, simply go the ***Windows*** menu and cascade them again.